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TRUST

No sales. No commissions. Period. If you seek a fee-only financial planner in Dallas/Fort Worth or a fee-only financial advisor in Atlanta who is making recommendations based on your needs and not what commission we can make, then you owe it to yourself to give us a call.

READ MORE {HTTPS://WWW.HERITAGEFINANCIALPLANNING.COM/THE-HERITAGE-DIFFERENCE}

KNOWLEDGE

Competence begins with extensive knowledge. Our financial advisors have completed rigorous coursework in all aspects of financial planning and have successfully achieved some of the most respected and difficult professional designations in the industry.

READ MORE {HTTPS://WWW.HERITAGEFINANCIALPLANNING.COM/THE-HERITAGE-DIFFERENCE}

EXPERIENCE

With decades of experience, the team at Heritage Financial Planning has expertise working with clients from all backgrounds including executives, government leaders, physicians, attorneys, trust beneficiaries, entrepreneurs and those that go to work every day in their career of choice.

READ MORE {HTTPS://WWW.HERITAGEFINANCIALPLANNING.COM/THE-HERITAGE-DIFFERENCE}

Managing your personal finances can, at times, seem to be an overwhelming process. And why shouldn't it be? You've spent years accumulating assets based on your skills and experience in your area of expertise, which probably was not in the field of personal money management. At Heritage Financial Planning, we understand that you are not an expert in finance.

Fortunately, we are[1]. While you've been honing your skills and knowledge in your chosen area, we have been building ours in the area of how to be excellent stewards for your money. We believe a quality financial planning firm is one where you can put your money in our hands and go on with your life, confident in the fact that we're taking care of your assets[2].

WHAT SETS US APART

Several factors set us apart from other financial planning firms. For one, we are actual fiduciaries, not just salespeople masquerading as money experts. As fiduciaries, we have a legal obligation to put our clients' best interests first. This works out just fine for us — but it might make you wonder what the financial planning firms that haven't been willing or able to become fiduciaries are up to.

Any financial advisor you work with at Heritage Financial Planning will be independent, meaning they're not beholden to any product from any company, nor are they required to try to get you to invest more or more widely than you are prepared to. They also don't have to keep you on the phone for X amount of hours. Our only goal is to help you determine what is in your best interest, then guide you down that path. Our only obligation is to you.

Another crucial feature of Heritage Financial Planning is that we are a fee-only advisor. Unlike other planners who always start their work "on-the-clock," we find that a fee-only approach is more beneficial to creating open dialogue and fostering a long-term relationship with our clients, allowing us to take care of you to the absolute best of our ability.

MONEY MANAGEMENT AND PEACE OF MIND IN DALLAS AND ATLANTA WITH HERITAGE FINANCIAL PLANNING

To us, the whole reason you look for asset management, retirement planning advice and other services related to your money is for peace of mind. You want to know your money is where it should be, so you can go on enjoying your life. If that sounds like you, and you're seeking personal financial management in Atlanta, Dallas or surrounding areas like Grapevine, Fort Worth, Plano, Frisco, Colleyville and Southlake, then get in touch with Heritage Financial Planning today.

We look forward to hearing from you and helping you with your individual financial management needs. We offer a free initial consultation and have a wide range of services to suit your goals. To get started, please contact us now {https://www.heritagefinancialplanning.com/contact}.

1. The CFP®certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 71,000 individuals have obtained CFP® certification in the United States.
2. Past performance is not indicative of future results.

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*Private Asset Management Magazine "Best Private Wealth Manager - Client Service Firms Under $5 Billion" award winner is based on practice management, growth, service, and evaluation followed by a vote by Private Asset Management Magazine peer review panel and magazine executives.

*For a definition of the term "fiduciary" refer to this outside link to the NAPFA Fiduciary Oath {https://www.napfa.org/mission-and-fiduciary-oath}

*Answers to additional questions may be found by following this link: FAQ {https://www.heritagefinancialplanning.com/p/frequently-asked-questions}