



Welcome To Heritage Financial Advisors

Your financial advisor must have your confidence and trust

Your financial advisor must have your confidence and trust. What sets Heritage Financial Advisors apart from other financial advisory firms is its status as an independent advisory firm and its high ethical standards. Heritage's advisors act as a fiduciary for you, our client. Our investment philosophy follows the Prudent Investor Act, which requires advisor's to act in the client's best interests at all times. As a fee-based investment firm, the Heritage group will never advise its clients to invest in a mutual fund simply because Heritage has a relationship with that fund family. Our advisors have no proprietary products to sell. Instead, our interests are the same as those of our clients.

At Heritage Financial Advisors, we focus on establishing a strong one-on-one relationship with you to help you achieve your important financial goals. Knowing your goals assists us to establish a plan which helps you attain your financial objectives and stay within your risk tolerance range. We help you plan for important life events, such as a growing family, college for your children or grandchildren and retirement. Our objective is to help you plan prudently and for the long-term.



> Learn How Your Assets Are Protected (<http://heritagefa.com/wp-content/uploads/2017/08/Schwab.AssetProtection.8.17.pdf>)

Work with a CERTIFIED FINANCIAL PLANNER™.

Let us help you prepare for retirement.



Discover the difference with a
Registered Investment Advisor.

Explore Our Website

We encourage you to explore our site and learn more about the services we provide. Should you have any questions or would like more information on our firm, please feel free to email us at info@heritagefa.com or call us at **419-887-5887** or **800-769-3504**. We look forward to hearing from you!

Achieve Your Financial Goals With:

- Comprehensive Financial Planning
- Investment Management
- Retirement Plans
- College Savings Plans
- Annuities
- Life Insurance & Disability
- Long-Term Care Insurance