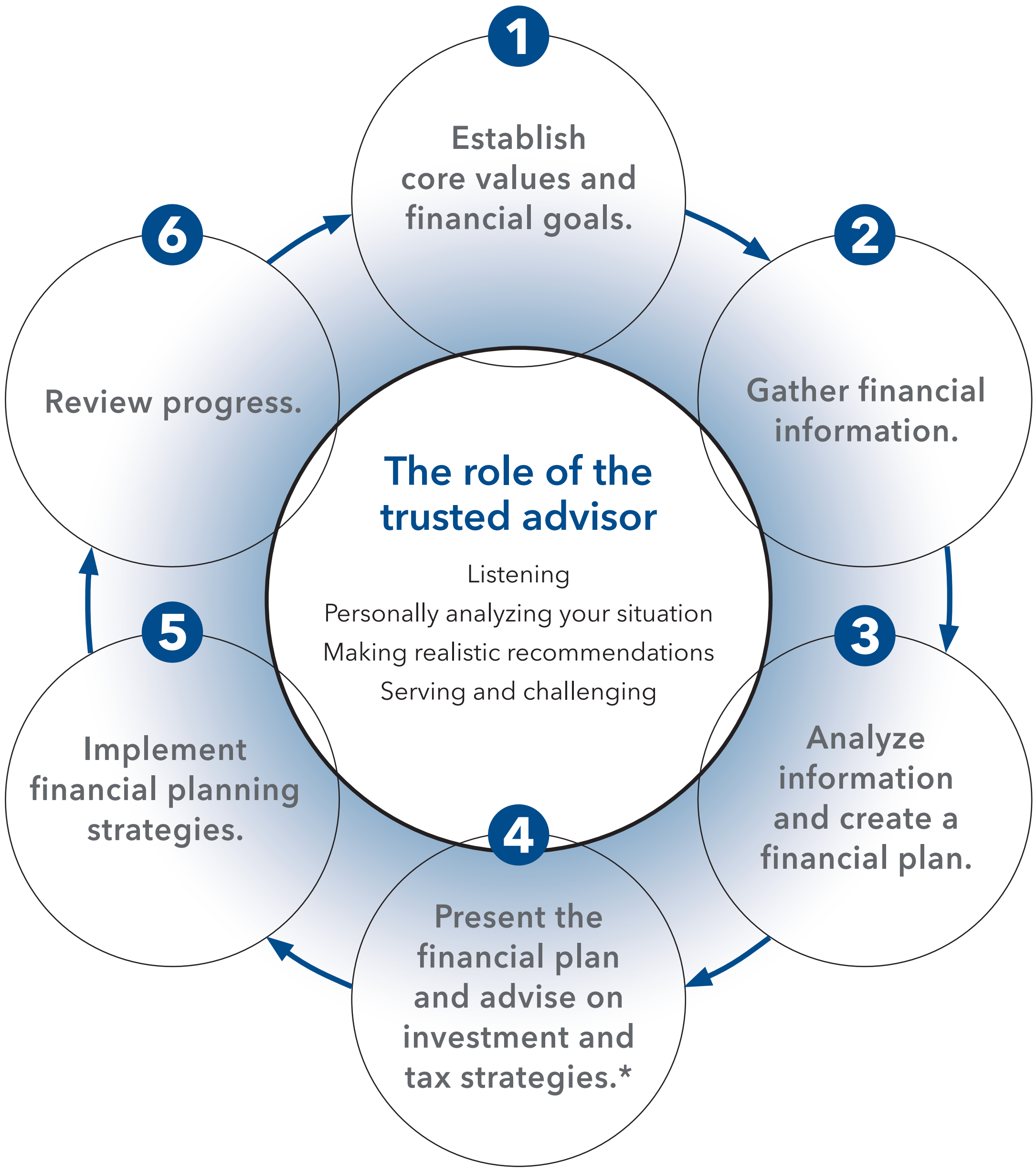
Heritage
WEALTH STRATEGIES

THE FINANCIAL PLANNING PROCESS

Create a comprehensive look at your financial picture and a road-map to achieving your goals.

When it comes to growing and protecting your wealth, creating a plan is an important first step. Our local wealth advisors can help grow and manage your wealth successfully by asking the right questions about your current investments and your future plans, and by offering objective guidance and transparency—on your terms.



HeritageBankNW.com | Wealth Strategies
503.306.5400 | 888.360.0052

* For a comprehensive review of your personal situation, always consult with a tax or legal Advisor. Neither Cetera Investment Services, nor any of its representatives may give legal or tax advice.