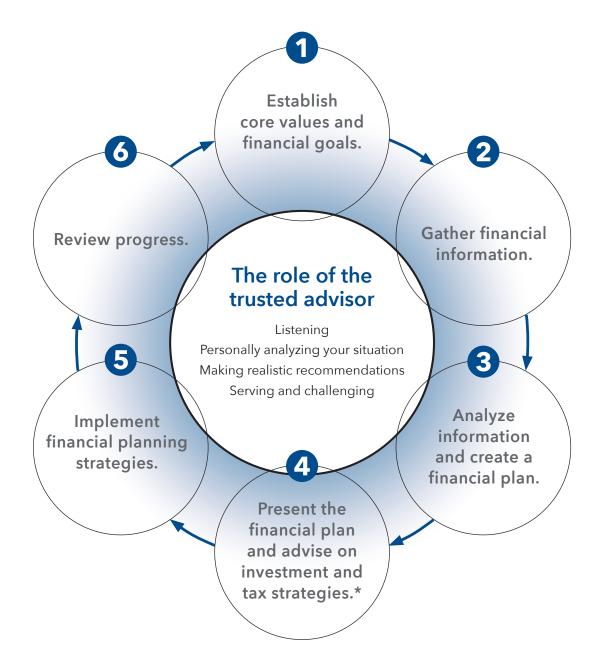
## Heritage WEALTH STRATEGIES

## 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.



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\* 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.

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