

HERITAGE GENERATIONS GROUP

Comprehensive wealth management and technology solutions tailored to our next generation of clients.



YOUNG ADULTS

In college or recent grads looking to start saving for their future and learn more about personal finances.

PROFESSIONALS

Early into their career, but quickly advancing, looking for guidance on how to save outside of their employer retirement plan.

COUPLES

Planning to purchase a home and/or start a family. We can provide guidance through major life decisions.

ENHANCED ONLINE PLATFORM

- ✓ No minimum for investing cash
- ✓ No transaction fees
- ✓ Automated tax-loss harvesting
- ✓ Goal forecasting tool tracks progress toward achievement of your goals
- ✓ Link accounts for consolidated financials
- ✓ Easily make deposits, transfers, and withdrawals

HERITAGE INVESTMENT TEAM

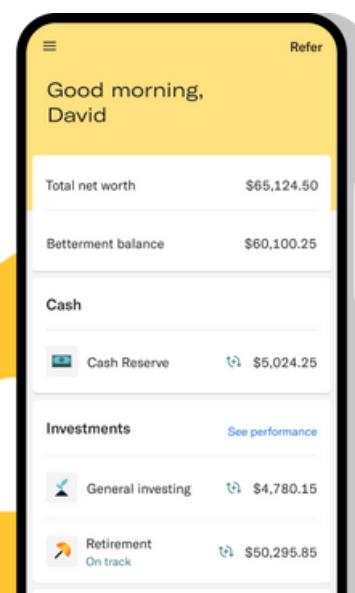
- ✓ Investment selection by our experienced investment team

DEDICATED HERITAGE ADVISOR

- ✓ Proactive advice and ongoing monitoring

BETTERMENT PARTNERSHIP

With a user-friendly online account management platform you can view your entire financial picture, invest, and save —anytime, anywhere.



WWW.HERITAGEFINANCIAL.NET

*This service is offered only to family members of Heritage Financial clients.