

Investment Advisory Overview

Investment Advisory Mission-

At Heritage Wealth Advisors, our mission is to offer each client disciplined investment options with exceptional client service and perspective.

Investment Philosophy-

- Heritage Wealth Advisors bases investment decisions on first-hand knowledge of each **client's objectives and desires**.
- We manage risks through **disciplined portfolio construction and continuing maintenance** at the investment level.
- We seek to deliver **after-fee and after-tax excess returns** through appropriate asset allocation and superior investment selections.
- Our disciplined investment process enables us to **objectively evaluate and utilize investment opportunities without bias**.
- Heritage Wealth Advisors investment methodology provides the opportunity to achieve your investment goals through **client-specific asset allocations** while helping to **avoid the pitfalls of chasing the most recent market fads**.