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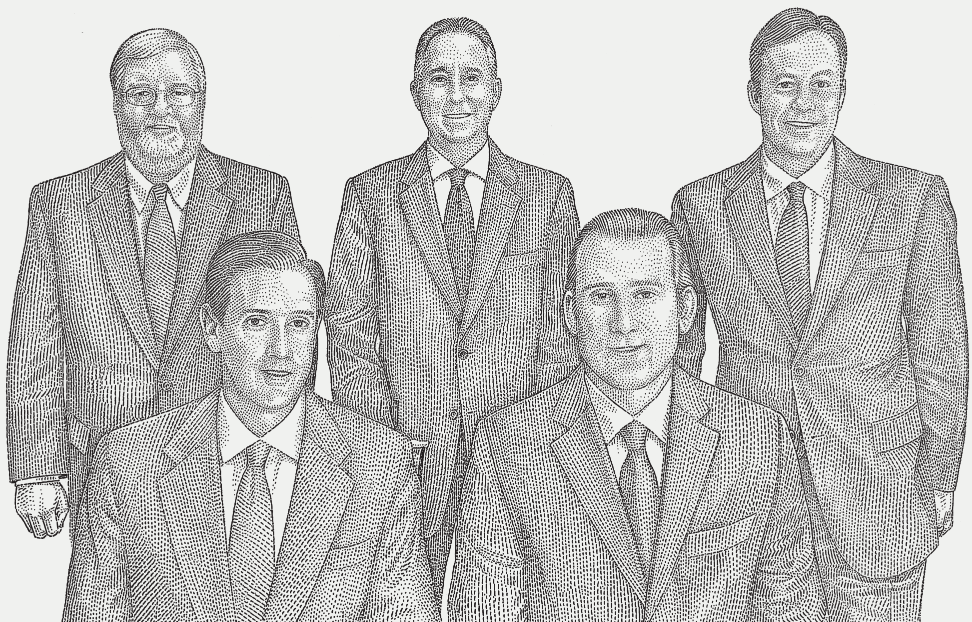
"Find managers who do not view diversification as a substitute for knowledge."

—Heritage Financial Consultants LLC

How to reach Heritage Financial Consultants LLC

Please contact any member of our team at 410.771.5665 *for an initial conversation regarding how Heritage Financial Consultants can customize a wealth management strategy to suit your needs.*



Seated, left to right: Brian Horn, John McCarthy; *standing, left to right:* Kenneth Rudzinski, Peter Maller, Brian Gracie

About Heritage Financial Consultants LLC

Heritage Financial Consultants LLC is a full-service, independent wealth management firm established in Baltimore, Md., in 1999. Founded on the principle that the client relationship, prudent recommendations and access to the best products, research and solutions are what will ultimately define its place in the financial industry, the firm has grown substantially to include three office locations and more than $2 billion in client assets under management. Heritage Financial Consultants is uniquely positioned within the wealth management industry due to its alignment with some of the best-known money managers, analysts, investment services and institutions. The firm's broker/dealer, Lincoln Financial Advisors Corp., serves as a support system, further scrutinizing products provided to clients. The firm utilizes resources, cultivated over the years, to deliver the highest level of customer access to the marketplace. Heritage Financial Consultants LLC has specialists who implement the following strategies customized to your situation: investment planning, insurance planning, retirement planning, tax planning, estate planning, employer retirement planning and executive bonus planning.

Assets Under Management
$2.1 billion (firm)

Minimum Fee for Initial Meeting
None required

Minimum Net Worth Requirement
$5 million (planning services)
$1 million in assets (investment services)

Largest Client Net Worth
$550 million

Website
www.heritageconsultants.com

Compensation Method
Fixed and asset-based fees

Primary Custodian for Investor Assets
Fidelity, National Financial Services

Professional Services Provided Planning, investment advisory, money management, advanced wealth transfer planning and corporate services

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