



HERITAGE

We are substantially more than just a record-keeping firm. We provide a complete range of consulting, research, administration and communication services throughout the entire field of tax-qualified plans, non-qualified plans, fiduciary analysis and estate planning.

WHAT MAKES US DIFFERENT?

Our principal and plan administrators average over 20 years of experience in the retirement and pension fields. The principals are involved in all aspects of your plan: from plan design to implementation or conversion to ongoing service.

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