Heritage Wealth Advisors

TRUST SCORE

97%

Heritage Wealth Advisors, federally registered in 2005, is a Registered Investment Advisor (RIA) in 5 state(s) with a licensed staff of 8 advisors. Heritage Wealth Advisors manages $1.4 billion and provides investment advisory services for 261 clients (1:33 advisor/client ratio).

Heritage Wealth Advisors requires a $0 minimum investment.

BENEFITS

Firm does not have any felony convictions (Impact:High)

Firm does not have a disciplinary history (Impact:High)

Firm uses a transparent fee-only model (Impact:High)

Firm has been federally registered for 13 years (Impact:High)

Firm has $1B or more in assets under management (Impact:Medium)

Communications sent to the firm's website are secure and encrypted (Impact:Medium)

Firm does not have any misdemeanor convictions (Impact:Medium)

Firm does not have an insurance agent conflict (Impact:Medium)

Firm does not privately manage or own the products they recommend (Impact:Low)

CONSIDERATIONS

Firm may receive soft-dollar benefits that could incentivize them to push trades through broker-dealers that provide advantages to the firm instead of through broker-dealers that could provide the best execution for their clients (Impact:Low)

BENEFITS (cont.)

Firm does not accept performance-based fees (Impact:Low)

Firm does not perform side-by-side management (Impact:Low)

Firm provides mobile-friendly experience for their clients (Impact:Low)

CONSIDERATIONS (cont.)