

Why Heise Advisory Group?

12444 POWERS COURT DRIVE SUITE 235 | (314) 909-1116 | HEISEADVISORYGROUP.COM

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Do you feel like you've worked extremely hard to get where you are in life, and now you want your money to work just as hard for you? Would you appreciate planning that is custom fit to your goals and dreams? Do you value advice aligned with your best interests?

Then Heise Advisory Group is for you.

We know our team is not for everyone, and not everyone is the right fit for us—and that's ok. We don't give cookie-cutter financial advice. Our goal is to provide **custom-tailored wealth management** for each one of our families.

Some may think our **attention to detail and high-touch approach** in how we handle our client relationships is overkill - and they're right. Does a wealth management team really need to go the extra mile to coordinate your investment strategy with a tax professional and estate planning attorney? No. On the other hand, if you value **minimizing your future taxes, preserving your wealth** for you and your family, and developing a plan with the goal to help **minimize risk and maximize growth**, then let us custom build a plan for you and your specific situation.

We think you're going to love how we take something as complex as **managing all aspects of your wealth** and make it simple and understandable. We think you'll love how we create your retirement income plan with the goal of eliminating the fear of running out of money, and how we **monitor your plan and share regular progress updates** with you. We think you're going to love the social opportunities we offer throughout the year like informational events to keep you current and themed client appreciation events.

We absolutely can't wait to welcome you into our client family, but most of all we can't wait to help you feel the **confidence and freedom** that can come with a well thought out plan built specifically for you and your family.

You have worked hard to build what you have saved; isn't it time to work with a team whose goal is to work just as hard to help you protect and grow it? At Heise Advisory Group, our goal is to help you feel the security and confidence of knowing that you are on the right track.

Your Best is Yet to Come!

Investing involves risk, including the potential loss of principal. Any references to protection benefits, safety, security, lifetime income, etc generally refer to fixed insurance products, never securities or investment products. Insurance and annuity product guarantees are backed by the financial strength and claims-paying ability of the issuing insurance company. Neither the firm nor its agents or representatives may give tax or legal advice. Individuals should consult with a qualified professional for guidance before making any purchasing decisions. Heise Advisory Group is an independent financial services firm that utilizes a variety of investment and insurance products. Investment advisory services offered only by duly registered individuals through AE Wealth Management, LLC (AEWM). AEWM and Heise Advisory Group are not affiliated companies. 01190316 02/22