American Heritage Securities, Inc.

affiliated with ***EGI Financial, Inc.***

Our Planning Services – *Your* Life Plan!

At American Heritage Securities and EGI Financial we offer the full range of financial services, including individual financial planning.

Adhering to the highest professional standards, we can provide the expertise, individualized attention and flexible solutions you need to achieve a lifetime of financial security.

Our goal is to help you realize your dreams and financial objectives through a financial plan that focuses on accumulating and preserving your money. Working together we will:

Introduce you to our firm and advisors

You will learn about our firm, our team approach and the professional background and financial expertise of our advisors. We will outline the financial planning processes we can offer and how they work.

Learn more about you

Through meetings and discussions, we will identify your immediate, short-term and future goals. Most importantly, we ascertain your challenges, goals, your lifestyle and dreams, examine your time horizons and find your risk tolerance level.

Determine where you are today

Every plan has a beginning and that's where we start. We will verify your personal responsibilities, current financial status, assets, liabilities and cash flow, investments, charitable giving, insurance coverage, tax strategies, retirement and estate planning.

Develop a financial plan

Working closely with you and your family, we will help you prioritize your goals and make recommendations that fit your life, your age, and your values. We will customize a plan that can meet your goals and objective. We are happy to collaborate with outside advisors such as attorneys or CPAs when needed.

Implement your plan

We want to take the worry out of financial planning, so we will worry for you. As we implement the plan we have established for you, we keep a vigilant eye on key economic indicators and act on your behalf.

Adjust your course

Life changes and so should your plan. We will encourage you to meet or communicate with us regularly and give us update when life circumstances change. We will advise you of changes in tax law or economic conditions. Together, we will monitor your plan to make the adjustments to put your financial plan on the best course for your life journey.