



*Every detail matters.*

## HERITAGE FINANCIAL SERVICES ANNOUNCES NEW SHAREHOLDERS

June 7, 2021

Heritage Financial is proud to announce the addition of Senior Wealth Manager, Paul Higgins, and Director of Operations, Karen Keefe, to its shareholder group. With these two new shareholders, Heritage has increased its employee owners to a total of eleven, in line with the Management Team's dedication to broadening the base of employee ownership and maintaining the independence that allows the firm to focus solely on working in the best interests of its clients.

Chuck Bean, Founder and CEO of Heritage Financial congratulates these new employee shareholders, stating, "There are many key qualities we look for in our employee owners, including exceptional job performance, adherence to the firm's core values, and contributing to the business beyond their job functions. I am extremely proud to welcome Karen and Paul as the newest shareholders of Heritage Financial."

### **Paul Higgins, CFP®, CLU®, ChFC®, CLTC, AWMA®**



Paul joined Heritage in 2017 with more than 30 years of experience in the financial services industry. As a Senior Wealth Manager with Heritage Financial, he works directly with some of the firm's largest and most complex relationships. His strong background in estate and insurance planning has not only served his clients well but has also allowed Paul to assist other Wealth Managers with complex estate and insurance situations. Paul has also had the opportunity to mentor several Wealth Advisors during his time with Heritage.

### **Karen Keefe, FPQP™**



Karen has been with Heritage for 18 years and has been the Director of Operations since 2015. From her early days as a Client Service Associate to her current role overseeing all of Operations, Karen has always been a role model for putting clients first. Her team touches every single client of the firm, from initial onboarding to day-to-day servicing. Karen continuously shares her experience and knowledge with others at the firm. She participates in the Process Improvement Committee and holds project leadership roles for many initiatives behind the scenes that are key to providing exceptional service to our clients.