Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
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Charles P. Weidman, CFP®, MBA

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www.HeritageFinancialCounselors.com

This brochure supplement provides information about Mr. Weidman that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Weidman if you did not receive Heritage Financial Counselors, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Weidman is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD #3252726.

Item 2: Educational Background & Business Experience

Charles Patrick Weidman
Year of Birth: 1958

Educational Background:

- 1980: Eastern Illinois University; Bachelor of Business Administration in Finance
- 1987: DePaul University, Kellstadt Graduate School of Business; MBA in Finance
- 2007: The American College; CERTIFIED FINANCIAL PLANNER, CFP® Designation

Business Background:

- 07/2017 – Present Heritage Financial Counselors, LLC; Managing Partner, Chief Compliance Officer & Financial Counselor
- 03/2012 – 08/2017 LPL Financial, LLC (dba Heritage Financial Counselors); Registered Representative
- 06/2010 – 03/2012 Financial Focus, LLC; Financial Advisor
- 03/2007 – 06/2010 Mid Atlantic Resource Group; Financial Advisor
- 03/2007 – 06/2010 Minnesota Life Insurance Co; Agent
- 03/2007 – 06/2010 Securian Financial Services, Inc; Financial Advisor
- 05/2005 – 02/2007 Northwestern Mutual Investment Services, LLC; Financial Advisor

Exams, Licenses & Other Professional Designations:

- 2005: Series 7 & 63 Exams
- 2006: Series 66 Exam

The CFP® certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam and agreeing to be bound by the CFP® board's *Standard of Professional Conduct*. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the *Standards of Professional Conduct*.

Item 3: Disciplinary Information[1]

There are no legal or disciplinary events material to the evaluation of Mr. Weidman.

[1] Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Item 4: Other Business Activities

Mr. Weidman does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 5: Additional Compensation

Mr. Weidman does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Mr. Weidman is the sole owner and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.