



For Immediate Release

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Heritage Bank Announces New Wealth Management Service

Burlington, KY – Heritage Bank (www.heritagebank-ky.com) announces the rollout of Heritage Wealth Management, its new financial planning service. The bank has partnered with Investment Professionals, Inc. (IPI), an investment brokerage firm from San Antonio, TX, and now offers comprehensive financial planning and investment advisory services to customers across its seventeen Northern Kentucky branches. Services such as retirement planning, professionally managed advisory accounts, mutual funds, annuities, 529 plans, long term care and life insurance and 401K plans are now available to existing Heritage Bank clients as well as any individual seeking these services.

“We believe our partnership with IPI is a tremendous extension of our trusted relationship with our customers,” said H. Lytle Thomas, President & CEO of Heritage Bank. “Customers are always our main priority. Through the combined expertise and reliability of both Heritage Bank and IPI, we’re ensuring our customers and their families have access to the important investment services they need.”

Robert J. Davis will serve as the financial advisor for those Heritage customers who wish to take advantage of any of these new services. Mr. Davis is a Union, KY resident and has over 14 years of finance industry experience in both bank brokerage and wirehouse settings.

“Creating opportunities to add significant financial value to our Heritage Bank customers is something I’m really excited about,” said Mr. Davis. “We look for these new products to be an instrumental resource for them.”

About Heritage Bank

Heritage Bank was chartered in 1990 by a group of local businessmen who, in the face of expanding interstate banks and national bank holding companies, wanted to preserve the concept of local banking. They believed then, as they do now, that there is great benefit in personal banking—knowing customers on a first-name basis and understanding the financial needs of individuals, families and their businesses. Heritage Bank has 17 [offices](#) in Boone, Kenton, Campbell, Pendleton, and Grant counties to serve you. Member of the Federal Deposit Insurance Corporation. For more information, visit <http://www.heritagebank-ky.com>.

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