

**Item 1 Cover Page**

A.

**Paul Brian Schatz**

Heritage Capital, LLC

Brochure Supplement

Dated: March 1, 2017

Contact: Paul B. Schatz, Chief Compliance Officer  
1 Bradley Road, Suite 202  
Woodbridge, Connecticut 06525

B.

**This Brochure supplement provides information about Paul Brian Schatz that supplements the Heritage Capital, LLC Brochure; you should have received a copy of that Brochure. Please contact Paul B. Schatz, Chief Compliance Officer, if you did *not* receive Heritage Capital, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Paul Brian Schatz is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 2 Education Background and Business Experience**

Paul Brian Schatz was born in 1966. Mr. Schatz graduated from University of Rochester in 1988, with a Bachelor of Arts degree in Political Science. Mr. Schatz has been President and an investment adviser representative of Heritage Capital, LLC since June of 2003.

**Item 3 Disciplinary Information**

None.

**Item 4 Other Business Activities**

- A. Mr. Schatz is a minority partner in Numetrix Capital, an investment research firm providing quantitative investment solutions to financial advisors. This activity requires a very limit number of hours per week.
- B. Mr. Schatz is not actively engaged in any non-investment-related business or occupation for compensation.

**Item 5 Additional Compensation**

None.

**Item 6 Supervision**

Heritage Capital provides investment advisory and supervisory services in accordance with current state regulatory requirements. Heritage Capital's Chief Compliance Officer, Paul Schatz, is primarily responsible for overseeing the activities of Registrant's supervised persons. Mr. Schatz also monitors accounts and conducts account reviews on at least an annual basis. Should a client have any questions regarding Registrant's supervision or compliance practices, please contact Mr. Schatz at (203) 389-3550.

**Item 7 State-Registered Investment Advisers**

- A. Mr. Schatz has never been involved in an arbitration or mediation proceeding or any client initiated complaint proceeding.
- B. Mr. Schatz has never been the subject of a bankruptcy petition.