



HERITAGE CAPITAL LLC

Invest for Tomorrow. Live for Today.™

As you may know, every year Heritage Capital supports a number of charitable organizations whose missions align with ours. It is our pleasure and privilege to donate on behalf of you, our treasured clients, to honor your birthdays, 9-11 and Thanksgiving.

In 2020, we are proud to share our support for the following organizations:

JDRP works tirelessly to find better treatments, preventions and ultimately, a cure for type 1 diabetes (T1D) and its complications through critical research. Every dollar we are able to direct toward this research comes from donors like you.



Camp Courageous provides exceptional year-round recreational and respite care opportunities for individuals with special needs and their families. The camp is run primarily on donations, giving all

individuals the opportunity to give through gifts of time, materials, money, and other means that support the camp.

Tunnel to Towers Foundation has been committed to helping 9/11 heroes, both living and fallen by providing mortgage-free homes, education and empowerment.





Families of Freedom Scholarship Fund

provides scholarships to protect the dreams of students whose families were directly impacted by 9/11. They have awarded \$176.5 million to 3,848 children whose parent was lost or severely affected by the 9/11 attack and rescue mission.

CDP Covid 19 Response Fund (Disaster of Philanthropy)

The CDP

COVID-19 Response Fund is

focusing on support for nonprofit organizations working directly to respond to the pandemic among vulnerable populations in order to help build their capacity to address the most pressing needs. These include social service organizations focused on supporting low-income households, small businesses, immigrants, refugees, Native Americans and Alaska Natives, older adults, people with disabilities, and other communities vulnerable to the physical health, mental health and economic impacts of the pandemic.



Action Against Hunger is a global humanitarian organization who is committed to ending world hunger. The organization helps malnourished children and provides communities with access to safe water and sustainable solutions to hunger.

My Stuff Bags Foundation provides new belongings, comfort and hope to thousands of children each year who must be rescued from abuse, neglect, abandonment, and homelessness across the United States. By rallying widespread individual and corporate involvement through our unique My Stuff Bags program, they address the immediate physical and emotional needs of rescued children, and help support the agencies caring for them.



To Your Financial Success,



Paul Schatz
President
Heritage Capital LLC

1 Bradley Road Suite 202
Woodbridge CT 06525

203.389.3553 Phone
203.389.3550 Fax

www.InvestForTomorrow.com

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StreetSmarts is produced and distributed regularly via email by Paul Schatz of Heritage Capital, LLC
1 Bradley Road, Suite 202 Woodbridge CT 06525 Phone (203) 389-3553 Fax (203) 389-3550 - www.InvestForTomorrow.com
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For reasons including variances in the investment management fee incurred, market fluctuation, the date on which a client engaged Heritage's investment management services, and any account contributions or withdrawals, the performance of a specific Heritage client's account may have varied substantially from the indicated portfolio performance results.

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Information pertaining to Heritage's advisory operations, services, and fees is set forth in Heritage's current disclosure statement, a copy of which is available from Heritage upon request. Performance results have been compiled solely by Heritage, are unaudited, and have not been independently verified. Heritage maintains all information supporting the performance results in accordance with regulatory requirements.