Item 1 Cover Page

A.

Paul Brian Schatz

Heritage Capital, LLC

Brochure Supplement
Dated: February 28, 2026

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 (CRD #2241878) 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.

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 not actively engaged in any other investment-related businesses or occupations.

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 the Registrant's policies and procedures manual. The primary purpose of Heritage Capital's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). Heritage Capital's Chief Compliance Officer, Paul Schatz, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of Heritage Capital's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of Heritage Capital have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding Heritage Capital's supervision or compliance practices, please contact Mr. Schatz at (203) 389-3553.

Item 1 Cover Page

A.

Ronald Robert Milone

Heritage Capital, LLC

Brochure Supplement
Dated: February 28, 2026

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

B.

This Brochure supplement provides information about Ronald Robert Milone (CRD #4200818) 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 Ronald Robert Milone is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Education Background and Business Experience

Ronald Robert Milone was born in 1956. Mr. Milone graduated from University of Connecticut in 1978, with a Bachelor of Science degree in Accounting. Mr. Milone received his Master's degree in Business Administration from the University of Connecticut in 1979. In 1982 Mr. Milone earned his designation as a Certified Public Accountant and has been in practice ever since. In 2000 Mr. Milone became an investment adviser representative and then earned his Certified Financial Planner designation in 2005.

Mr. Milone is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold

the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

A. Mr. Milone is not actively engaged in any other investment-related business or occupation for compensation.

B. Mr. Milone 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 the Registrant's policies and procedures manual. The primary purpose of Heritage Capital's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). Heritage Capital's Chief Compliance Officer, Paul Schatz, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of Heritage Capital's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of Heritage Capital have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding Heritage Capital's supervision or compliance practices, please contact Mr. Schatz at (203) 389-3553.

Item 1 Cover Page

A.

Christopher Todd Angle

Heritage Capital, LLC

Brochure Supplement
Dated: February 28, 2026

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

B.

This Brochure supplement provides information about Christopher Todd Angle (CRD #3149166) 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 Christopher Todd Angle is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Education Background and Business Experience

Christopher Todd Angle was born in 1949. Mr. Angle graduated from University of Michigan in 1971, with a Bachelor of Arts degree in Biological Anthropology; and in 1978 from Japan Missionary Language Institute with a Masters of Arts degree in Japanese. Mr. Angle has been an investment adviser representative of Heritage Capital, LLC since 2018.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

A. Mr. Angle is not actively engaged in any other investment-related businesses or occupations.

B. Mr. Angle sells books under the D/B/A of Philosophy Publishing Company. Mr. Angle teaches children and adults the sport of judo under the company named Stamford Learning Center, LLC.

   Since 2010, Mr. Angle has been an Adjunct Professor at the University of Bridgeport, the International College.

Item 5 Additional Compensation

None.

Item 6 Supervision

Heritage Capital provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of Heritage Capital's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). Heritage Capital's Chief Compliance Officer, Paul Schatz, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of Heritage Capital's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of Heritage Capital have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding Heritage Capital's supervision or compliance practices, please contact Mr. Schatz at (203) 389-3553.