

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
January 2023**

**Jessica L. Perkins**



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**Firm Contact:  
Charles P. Weidman, CFP®, MBA  
Chief Compliance Officer**

This brochure supplement provides information about Ms. Perkins that supplements our brochure. You should have received a copy of that brochure. Please contact Charles P. 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 Ms. Perkins is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #7692724.

## Item 2: Educational Background & Business Experience

**Jessica L. Perkins**  
**Year of Birth: 2000**

### **Educational Background:**

- 2021: Boston University; Financial Planning Certificate
- 2020: Johnson & Wales University Providence; Bachelor of Science in Business Management

### **Business Background:**

- 08/2020 – Present      Heritage Financial Counselors, LLC; Associate Advisor/Director of Nextgen Planning
- 01/2013 – 08/2020      Student

### **Exams, Licenses & Other Professional Designations:**

- 11/2022:      CERTIFIED FINANCIAL PLANNER™, CFP®

### **CERTIFIED FINANCIAL PLANNER™, CFP®**

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its high standard of professional education, stringent code of conduct and standards of practice and ethical requirements that govern professional engagements with clients. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: Complete an advanced college-level course of study addressing the financial planning subject areas that CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university, pass the comprehensive CFP® Certification Examination, Complete at least three years of full-time financial planning-related experience and agree to be bound by CFP® Board's *Standards of Professional Conduct*.

Individuals who become certified must complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial industry and renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

## Item 3: Disciplinary Information

There are no legal or disciplinary events material to the evaluation of Ms. Perkins.

#### **Item 4: Other Business Activities**

Ms. Perkins does not have any outside business activities to report.

#### **Item 5: Additional Compensation**

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

#### **Item 6: Supervision**

Mr. Weidman, Managing Partner and Chief Compliance Officer of Heritage Financial Counselors, LLC, supervises and monitors Ms. Perkins's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Weidman if you have any questions about Ms. Perkins's brochure supplement at (862) 579-2899.