Because making Good Financial Decisions is important...
Heggie Investment Partners is here to help.

HEGGIE
INVESTMENT PARTNERS

RAYMOND JAMES

140B Rue Beauregard
Lafayette, LA 70508
337-889-0270

www.heggieinvestmentpartners.com

about us

Our Mission

We are in this business to make a positive difference in the lives of our clients.

What We Do

Our team uses a structured process of personalized financial planning, education, and investment strategies to help you clarify your financial goals and manage your investments, risks, liabilities and cash flow.

Let us put our experience to work for you!

our team

Nanette Soileau Heggie

Nanette.Heggie@RaymondJames.com

CERTIFIED FINANCIAL PLANNER®

- 30+ years of financial industry and 6 years IRS experience.
- Licenses in General Securities (7, 63, 65), life insurance, long term care insurance, variable, fixed, and index annuities.
- Licenses in General Securities Sales Supervisor (9,10).
- Provides financial planning and investment and tax strategies along with branch leadership and supervision.

our team

Maria Pusateri Tyler

Maria.Tyler@RaymondJames.com

FINANCIAL ADVISOR

- Joined the HIP team in March 2019.
- 4.5 years of prior insurance industry sales and management experience.
- Licenses in General Securities (7, 66) life insurance, long term care insurance, property and casualty insurance, variable, fixed, and index annuities.
- Licenses in General Securities Sales Supervisor (9,10).
- Conducts investment research along with financial strategy meetings and investment reviews.

Baxter Heggie

Baxter.Heggie@RaymondJames.com

BRANCH ASSOCIATE

- Joined the HIP team in June 2025.
- Graduated from Washington University in St Louis in May 2022.
- Provides client service and helps with coordinating financial review meetings.
- Assists in running retirement readiness and Social Security analysis calculations and projections.
- Currently studying for the SIE exam and plans to eventually pursue the Series 7 and Series 66 licenses.

our process

The Five Steps

We collaborate with YOU, Your Family, Your Accountant,
Your Legal Counsel and Other Specialists.

Understand

Clarify where you are and where you want to go

Diagnose

Determine your current weakness/gaps

Design

Your unique plan to help reach your goals

Implement

Your customized plan and investment solutions

Manage

We will review the progress of your plan relative to your defined objectives and suggest any changes where needed

who we serve

BUSINESS OWNERS

- Business Sales
- Risk Management
- Tax Advantaged Investments*
- Estate/ Business Succession Strategies
- Investment Management

WOMEN

- Overall Financial Planning
- Insurance/ Risk Management
- Financial Organization
- Client Symposiums and Workshops
- Investment Management

PROFESSIONALS

- Investment Management
- Asset Allocation for 401ks
- Retirement Planning
- Tax Planning*
- Stock Option Planning
- Overall Financial Planning
- Determining Retirement Readiness

RETIREES/PRE-RETIREES

- Retirement Income and Tax Planning Strategies*
- Investment Management
- Determining Proper Asset Allocation
- Risk Management
- Legacy/Estate Planning

We have the tools and resources to help you live the life you've dreamed of...

*Raymond James and its advisors do not offer tax or legal advice. You should discuss any tax or legal matters with the appropriate professional..

managing our relationships


This MAP was prepared for you by Maria Tyler on behalf of your HIP team. Please contact her with any corrections.

Starting Point

HEGGIE INVESTMENT PARTNERS

Your HIP Team: Owner/Branch Manager: Nanette Soileau Heggie, CFP®
Financial Advisor: Maria P. Tyler

Step #1
Date:

Step #2
Date:

Step #3
Date:

Step #4
Date:

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment Advisory Services offered through *Raymond James* Financial Services Advisors, Inc.Heggie Investment Partners is not a registered broker/dealer and is independent of RaymondJames Financial Services

Step #10
Date:

My Action Plan

Understand, Diagnose, Design, Implement, Manage

The right process for reaching your financial goals.

Step #5
Date:

This is not a replacement for the official customer account statements or trade confirmations from Raymond James or other custodians. Investors are reminded to compare the findings in this report to their official customer account statements. Past perf
guarantee future results. Investing involves risk and you may incur a profit or loss regardless of strategy

Step #9
Date:

Step #8
Date:

Step #7
Date:

MAP for: Filing Status: Date:

MAP values are based on estimates.
Please check source documents for actual figures.

www.HeggieInvestmentPartners.com

We create a "MAP" based on your goals!

Through this process You:
Get Organized
Prioritize Goals
Collaborate on Plans
Stay on Track.

managing your plan

This MAP was prepared for you by Maria Tyler on behalf of your HIP team. Please contact her with any corrections.

I.	Past Actions	Year	Long-Term Goals (5+ years)	Year	Short-Term Goals (0-5 years)	Year
1						
2						
3						

Children:
Parents:

Hobbies/Charities:
CPA: Attorney
Our trusted contact is Give POA? __ Yes X No ___ Form 1921

RJFSA, RJA Wrap, Mgr, CFP & ADV-2B
Investor Profile Score:
Expense Estimate Spreadsheet
Client Financial Organizer
Discussed Online Access
Explained RJ statements
Date of current will NONE
Retirement Plan Statements
GPM Retirement Income Plan ______
Analyzed Social Security Information
Copies of tax returns

II. Current Financial Status					
Estimated Yearly Income:	$0	His Income:		Rental Income:	
Prior Year's Living Expenses:		His SS Income:		Royalty Income:	
Emergency Fund:		Her Income:		Farm Income:	
III. Client Financial Organizer		Her SS Income:		Other Income:	

Future SS Full Retirement Income
His SS FR at age ____in _____=_________
Her SS FR at age ____in _____=_________

	Insurance	Company	Yearly Cost	Description		Insurance	Company	Yearly Cost	Description
1	Medical				6	Auto			
2	Disability				7	Home			
3	Long-term Care				8	Umbrella			
4	His Life				9	Flood			
5	Her Life					Approximate Insurance Costs		$0	

IV.	Assets	Company	Value	Description	V.	Illiquid Assets	Property Tax	Value	Description
1	Cash				15	Primary Home			
2	Checking				16	Real Estate			
3	Savings				17	Vehicles			
4	Investments				18	Personal Property			
5	Investments				19	Other			
6	Life Insurance				20	Other			
7	His Retirement					Estimated Illiquid Assets			
8	His IRA				VI.	Liabilities	Lender		
9					1	Home Loan			
10	Her Retirement				2	Home Equity Line of Credit			
11	Her IRA				3	His Car			
12	Her Roth				4	Her Car			
13					5	Credit Cards			
14					6	Student Loans/Other			
	Estimated Investment Assets		$0	Approximate Liquid Net Worth	$0	Estimated Liabilities			

MAP values are based on estimates.
Please check source documents for actual figures.

www.HeggieInvestmentPartners.com www

Our Financial Planning "MAP" worksheet helps you create an individualized “My Action Plan”.

how we help

During Your Career

- Financial planning and investments
- 401(k)s, stock plans, and IRAs
- Tax strategies*
- Risk and debt management
- Determining the right time to retire

We are passionate about financial literacy! Heggie Investment Partners often provides educational workshops for our clients and community.

As You Retire

- Cash flow management
- Investment selections
- Paperwork and timelines
- Social Security decisions
- Tax strategies*

Let our **Professional Guidance, Goal Planning and Monitoring** program, and **Financial MAP** process help you!

*Raymond James and its advisors do not offer tax or legal advice. You should discuss any tax or legal matters with the appropriate professional..

raymond james advantage

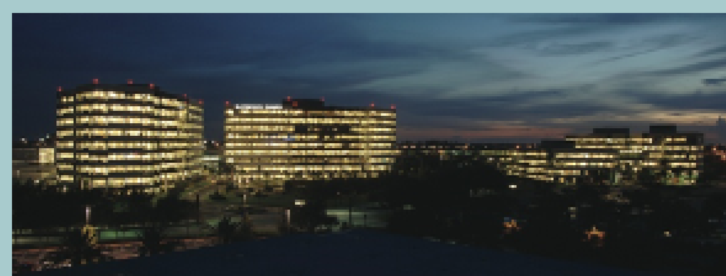
Provides Extensive Resources to Help Meet Your Objectives

You
and
Your Family

Your
Tax Professional

HEGGIE
INVESTMENT PARTNERS

Your
Attorney



Raymond James Resources and Specialists

Our team utilizes the extensive resources of Raymond James to meet the needs of our clients. This approach allows us to provide a wide range of solutions by leveraging the expertise of Raymond James professionals, while collaborating with your existing legal and tax relationships.

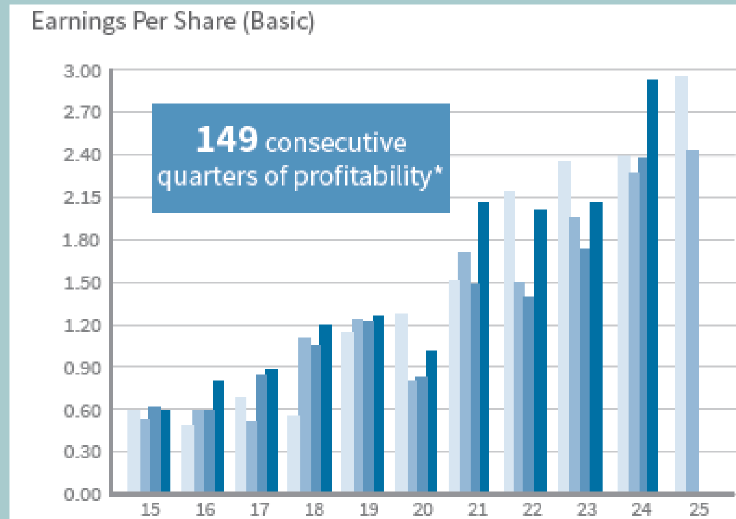
rj at a glance

Raymond James has delivered 145 consecutive quarters of profitability. We credit much of this performance to the firm's client-first perspective and adherence to its founding core values of professional integrity, advisor independence, and a conservative, long-term approach to investing.

BY THE NUMBERS

- Approximately ***8,800*** financial advisors
- Approximately ***$1.54 trillion*** in total client assets*
- More than ***2x*** required total capital ratio*
- Stable outlook credit ratings of A-, A- and A3 from Fitch. S&P and Moody's*

STRENGTH AND STABILITY



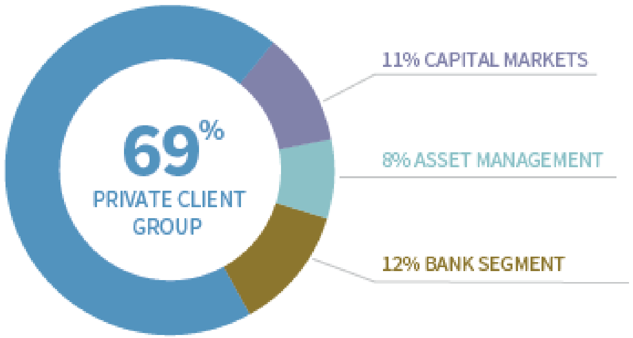
[1]During our fiscal fourth quarter of 2021, the Board of Directors approved a 3-for-2 stock split, effected in the form of a 50% stock dividend, paid on September 21, 2021. All share and per share information has been retroactively adjusted to reflect this stock split.

As of 3/31/2025 Past performance is not an indication of future results. The information provided is for informational purposes only and is not a solicitation to buy or sell Raymond James Financial stock. A credit rating of a security is not a recommendation to buy, sell or hold securities and may be subject to review, revisions, suspension, reduction or withdrawal at any time by the assigning rating agency. Raymond James Bank is an affiliate of Raymond James & Associates, Inc., and Raymond James Financial Services, Inc. Investment products are: not deposits, not FDIC/NCUA insured, not insured by any government agency, not bank guaranteed, subject to risk and may lose value. 24-BDMKT-6457 BS 4/24 rj at a glance

A DIVERSIFIED SET OF BUSINESSES

Total net revenues of $12.82 billion

Total net revenue for fiscal year ending Sept. 30, 2024



[2] Pie chart is intended to show relative contribution of each of the firm's four core business segments. The chart does not include intersegment eliminations or the "Other" segment. "Other" includes the firm's private equity investments, interest income on certain corporate cash balances, as well as certain corporate overhead costs of Raymond James Financial including the interest cost on our public debt, losses on extinguishment of debt and certain acquisition-related expenses.

DID YOU KNOW?

Continuing its tradition of giving back, Raymond James and its associates donated to charitable organizations in 2025, including **$8 million** to the United Way.

The firm also celebrated **14 years** of Raymond James Cares Month. More than 3,500 associates volunteered nearly 13,000 hours benefiting **313** charitable organizations across **118** communities.

Raymond James was the first in the nation to publish its Client Bill of Rights, setting the standard for the industry.

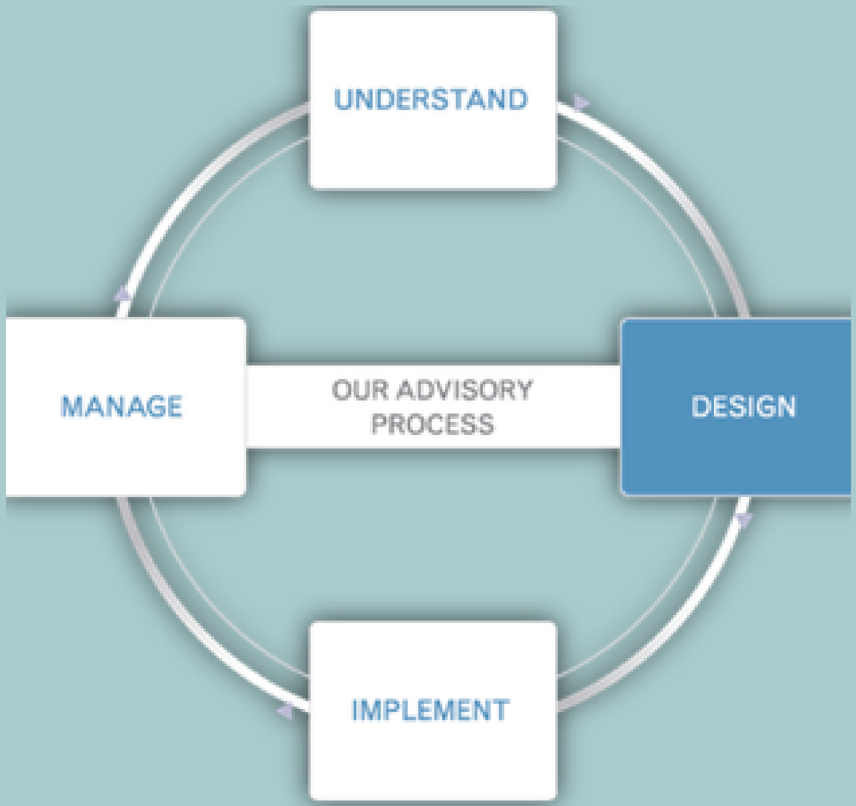
next steps

1. Decide if a relationship with us would be beneficial to you.

2. Discuss relevant information that is still needed.

3. Begin "MAP" worksheet.

4. Set up a follow-up meeting or conference call.



online investor access

Investor Access combines the freedom of online services with the essential support and guidance of your professional financial advisor. With this service you can review activity and balances in all your accounts, individually or combined.

- Complete access to your brokerage accounts and secure documents
- In-depth research and timely commentary
- Simple, easy-to-navigate design
- Quick-review home page featuring account summary and other convenient links
- Multiple account statement delivery options
- Quicken®, Microsoft Money® and TurboTax® download capability
- Mobile access via the Investor Access smartphone app

keys to our relationship

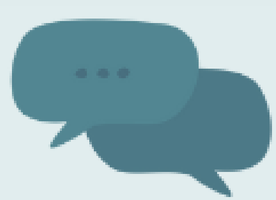
Our goal: Your 100% satisfaction with the advice and service you receive

Disclosure Confidentiality

- in order for us to give you our best service, it is critical you be as forthright as possible, providing us with complete and accurate information.
- In disclosing this information, you can be assured that we take stringent measures to protect your privacy,

Transparency and Communication

- The success of our long term relationship, and your long term investment experience depends on our maintaining an open ongoing dialogue.
- We will communicate with you regularly, openly and honestly about your financial plan, including fee schedules.
- If you have a question or concern about the management of your account, your statement, your fees, or just something you heard from a friend, contact us about it. We are here to help.



Referrals

- We focus the majority of our time on our clients, and we are very selective in building our client base. We depend on our best clients to help us grow and maintain a high quality practice by introducing us to people just like themselves.