

Item 1 Cover Page for Brochure Supplement

Tyler L. Rudek, CFA®
Partner/Chief Investment Officer
CRD#5377883

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Firm CRD #161261

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This brochure supplement provides information about Tyler L. Rudek that supplements the Heritage Wealth Architects, Inc. brochure. You should have received a copy of that brochure. Please contact James S. Knapp, Partner if you did not receive Heritage Wealth Architects, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Tyler L. Rudek is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Tyler L. Rudek, CFA®, Partner/Chief Investment Officer

Born: 1984

University of Minnesota, 2005 graduate, BS in Business/Major Entrepreneurial Management/ Minor Marketing

Mr. Rudek the Chief Investment Officer with Heritage Wealth Architects as of May 2015. As of October 2023 he is also a Partner with Heritage Wealth Architects. From August 2008 until July 2009 he was an Operations Specialist with Transamerica Retirement Management; from July 2009 until May 2015 a Registered Representative with Transamerica Investors Securities Corporation.

Requirements for the CFA Designation are as follows:

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute- the largest global association of investment professionals.

There are currently more than 90,000 CFA charterholders working in 135 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

Global Recognition

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders-often making the charter a prerequisite for employment.

Additionally, regulatory bodies in 19 countries recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

Comprehensive and Current Knowledge

The CFA Program curriculum provides a comprehensive framework of knowledge for investment

decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

To learn more about the CFA charter, visit www.cfainstitute.org

Item 3 Disciplinary Information

There are no legal or disciplinary events or proceedings to report concerning Mr. Rudek.

Item 4 Other Business Activities

Mr. Rudek is not engaged in any other business activities.

Item 5 Additional Compensation

Mr. Rudek does not receive compensation or other economic benefit from anyone for providing advisory services other than what has been described within the Heritage Wealth Architects, Inc. Brochure.

Item 6 Supervision

James S. Knapp is the President/CEO and Chief Compliance Officer, who monitors the investment advisory activities, personal investing activities, and adherence to the Advisor's compliance program and code of ethics of Heritage Wealth Architects, Inc. supervised persons on a continuous basis using various methods, including periodic inspection and review of client securities positions and transaction activity, obtaining certifications of compliance with company policies and procedures from those supervised, and obtaining and reviewing brokerage statements or transactions and holdings reports of the supervised persons. To provide adequate oversight of Heritage Wealth Architects, Inc. personnel, LeeAnn Peterson, Office Manager, will provide the same oversight activities over the Chief Compliance officer. James S. Knapp can be reached at (651) 289-6444.

Item 7 Requirements for State-Registered Advisers

Mr. Rudek has not been involved in an award or found liable in an arbitration claim, civil or self-regulatory organization event or administrative proceeding, or been the subject of a bankruptcy petition.