



For Immediate Release

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Heritage Financial Corporation Announces the Addition of Heritage Tax Services, LLC

*Personal and small business tax preparation is now available, just in time for
tax season*

Columbia, TN — March 11, 2026 — Heritage Financial Corporation is pleased to announce the addition of Heritage Tax Services, LLC, expanding its suite of financial services to better serve individuals and small businesses throughout Maury County and the surrounding communities.

Heritage Tax Services, LLC located at 217 S. James Campbell Blvd., Columbia, TN 38401, specializes in personal and small business income tax preparation. Services are offered by calling 931-378-8123 or emailing appointments@heritage-tax.com to schedule an appointment.

The launch of Heritage Tax Services, LLC reflects Heritage Financial Corporation's continued commitment to offering trusted, relationship-based financial solutions under the Heritage brand.

"Adding Heritage Tax Services allows us to better serve our customers and our community during an important time of year," said Jim Robinson, CEO and President of Heritage Bank & Trust. "Personal and small business tax preparation is a natural extension of the financial guidance we already provide. This service brings added convenience and trusted local expertise to our customers."

Heritage Tax Services, LLC operates with the same dedication to integrity, personalized service, and community focus that clients have come to expect from Heritage Bank & Trust.

Non-Deposit Disclosure

Heritage Tax Services, LLC is not a deposit, is not insured by the FDIC or any federal or state agency, and is not guaranteed by Heritage Bank & Trust.

About Heritage Financial Corporation

Heritage Financial Corporation is a locally focused financial services organization committed to helping individuals, families, and small businesses succeed through trusted relationships, personalized solutions, and strong community engagement.