

# Enriching Your Journey



## Advanced Strategies and Custom Solutions.

### On your own terms

At HJ Sims, we evaluate your individual situation and distinct aspirations to help position you to enjoy your desired lifestyle. We also recognize that retirement is neither traditional, nor is it dictated by a calendar or specific age – it's a mindset, a second-act and an opportunity for a new journey. You are more interested in pursuing your passions and creating a lifestyle to match your mindset. This is about your personal growth, identity, freedom and flexibility.

Whether your investment goal is to save for milestones or retirement, your HJ Sims financial professional crafts the right portfolio for you. Our wealth experts work tirelessly to construct a portfolio that helps to enrich your life and the lives of your family members for years to come.

### It's your adventure

Perhaps, you are ready to start your own business, delve into some freelance work and set your own schedule. Be your own boss. Maybe, you would like to have flexibility so you can embark on a new adventure, spend time enjoying

vibrant and cultural activities, as well as minding your health and wellness by being active. Or simply, spend more time with your family and friends. Planning for your journey should be exciting, freeing and empowering.

### Spend your time living your best life

We understand that you are busy enjoying life – and require an established wealth management firm to manage your assets. Applying our holistic wealth management approach, with your input, we map out your journey, managing your wealth. We stress test scenarios so you are prepared for market volatility and offer insight as to how your portfolio will work for you in real-time. You will find streamlined, expert advice paired with a creative approach, and custom investment products and advanced solutions that align with your vision.

At HJ Sims, we hear you. Yes, we are experts, but more importantly, we are your partner. We work with you and for you – collaborating toward a tangible goal – so you can spend your time living your best life.

HJ Sims is a SEC registered broker-dealer, a member of FINRA, SIPC and is affiliated and under common ownership and control with a state registered investment advisor: Herbert J. Sims Capital Management, Inc. (HJSCM). All investments bear the risk of partial or complete loss of capital. Past performance is not an indication of future results. Private Placements are exclusively available through HJ Sims, the broker-dealer. This material has been prepared and is distributed solely for informational purposes and is not a solicitation or an offer to buy or sell any security or instrument or to participate in any trading or invest strategy.



Connecticut (Fairfield) | Cathy Vancho | 2150 Post Road, Suite 301 | Fairfield, CT 06824 | 203.418.9000 / 800.221.9437 | Banking Fax: 203.256.2377 | Operations Fax: 203.256.2378 | [hjsims.com](http://hjsims.com) | Locations in Connecticut, Florida, Minnesota, New Jersey, Puerto Rico