

entirement[®]



We take your entire picture into account.
It makes all the difference.

The HJ Sims Difference

Deep insight and a passion for helping our clients succeed; this is one of the many reasons clients have relied on us across generations. But, what makes us different? What sets us apart in an increasingly crowded marketplace? With your goals in mind, we construct an investment portfolio that works best for you...at any life stage.

Through our wealth management investment strategies, in tandem with our innovative and exclusive income-generating investments, we help to position you for market trends and opportunities in all economic environments.

It's Not Just about Retirement

We enjoy watching our clients' families grow, along with their assets. We ask the right questions – but more importantly, we listen – to determine the long-term plan that works best for you. Whether you are investing for retirement or other special milestones, we uncover investment opportunities that other firms may overlook.

Why invest in just stocks or mutual funds when your portfolio holds so much more potential? We offer in-house holistic wealth management, examining equities, individual high-yield instruments, alternative investment strategies, portfolio management and more – helping you leverage the potential within the market, adjusting your portfolio to meet current conditions and better protect your assets. We look at the entire picture. That's entirement[®].

Past performance is not an indication of future results. Investments risks will vary by type of investment and potential investors should read in full the offering memorandum for each investment which will outline the risks. All investments bear the risk of partial or complete loss of capital. There is no guarantee that an investment will be profitable. The purchase and sale of securities should be conducted on an individual basis considering the risk tolerance and investment objectives of each investor and preferably with the advice of counsel of a professional advisor. This material has been prepared or 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 investment strategy. Member FINRA, SIPC



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Locations in Connecticut, Florida, Maryland, Minnesota, New Jersey, North Carolina, Pennsylvania, Puerto Rico, Texas

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