

# HJ Sims

## *Private Wealth Management*

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HJ Sims is a privately held investment bank and wealth management firm. Known as one of the nation's oldest underwriters of tax-exempt and taxable bonds, HJ Sims has raised more than \$28 billion for projects throughout the US.

As an independently run wealth management firm, HJ Sims has an extensive history managing wealth and generating income for our clients. We have been helping individuals and organizations realize their potential since our innovative founder, Herbert J. Sims, started the firm in 1935.

We help prepare our clients for the unexpected and the long-term, making financial planning feel less overwhelming. We help our clients alleviate apprehension, and plan for their journey, which should be exciting, freeing and empowering.

At HJ Sims, we are experts, but more importantly, we are our clients' partner. We work with them toward a tangible goal, applying our holistic wealth management approach. We help our clients develop a timeline, maximize their savings and get them to where they want to be. We offer streamlined, user-friendly resources paired with sophisticated investment products and solutions.

At HJ Sims, we 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. It is about personal growth, identity, freedom and flexibility.

As one of America's most tenured financial services firms, we remain true to our founding principles and a long tradition of loyalty, teamwork, integrity and expertise. This is our legacy. The name on our door is a continuing reminder of where we came from – and of where we are going.

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### **Contact**

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