



Peter J. Dee, Jr. (PJ), ChFC

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"I'm fortunate to have clients that are a pleasure to work with. They've worked hard to earn and save, and I make sure those savings work hard for them in return. They drive the process, and it's my job to fully understand their goals and work together with them in constructing a strategy to achieve those goals, then implement that strategy."

P.J. Dee always felt he was destined for a career in financial services, following in the footsteps of his father and grandfather; however, he majored in sociology in college because he wanted to learn as much as he could about people and the world around him.

After a few years with a Wall Street global investment management firm, P.J.'s passion for helping clients generate income to meet current needs and plan for retirement inspired his move to HJ Sims.

P.J.'s background and experience comes in handy when helping his clients make investment decisions that are right for them. "I've learned that it's important to let my clients take the lead, and to listen more than I speak. Once I feel certain that I fully understand a client's needs, we can develop a plan together, which I implement and oversee."

To P.J., it's important to be honest, knowledgeable and diligent in working with clients. "I can't control the market," he says, "but I do control the ability to do my best by my clients by making sound investment decisions with them, and helping them to meet their goals."

- Financial Professional holding Series 7, 63 licenses
- Investment Advisor with Herbert J Sims Capital Management, an affiliate of Herbert J Sims. (series 65 license)
- Chartered Financial Consultant ([ChFC](#))
- Joined HJ Sims in 2007
- Specializes in fixed income investments
- B.A. from Connecticut College