



José Iván Acosta Jordán

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José Iván Acosta Jordán

- Financial Professional holding General Securities Principal series 7, 63, 65, fixed and variable insurance
- Investment Advisor with Herbert J Sims Capital Management, an affiliate of Herbert J Sims. (Series 65 license)

José joins HJ Sims as Senior Vice President with more than 30 years of experience in the financial services industry in San Juan, Puerto Rico. José was attracted to HJ Sims because of the firm's stability, strength and depth of innovative financial solutions. As HJ Sims is highly respected with a solid reputation in Puerto Rico, José feels that he can offer clients the benefits of a firm that has permanence on the island. With the tools and support at Sims, José provides clients with customized solutions, while navigating uncertain markets and positioning them for market opportunities. Along with his experience, José's clients have access to more unique opportunities in insurance, annuities, tax-exempt/taxable bonds, managed accounts, private placements and other alternative investments.

Among José's many talents, he has advanced experience in financial planning, investments and private banking. José started his career with Shearson Lehman Brothers as Financial Consultant in 1989. José also served as Senior Vice President in the Global Private Client Division of Merrill Lynch Private Wealth Management, where he staffed the office in San Juan and participated on the President's Council.

José attended the University of North Carolina, Charlotte, where he played tennis on the NCAA Division I team. He graduated from University of the Sacred Heart, Santurce, with a BBA in finance in marketing.

In his spare time, José spends time with his family and their five rescue dogs. He has a strong passion for sports, and for guiding his daughters to follow their fellow interest in sports, as well as their pursuit of scholarly success.