



Elizabeth “Izzy” Sims

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Elizabeth “Izzy” Sims leads HJ Sims’s Wealth Management Consulting Group, focusing on new investment products and managed portfolio solutions. She began her career in wealth management at JPMorgan’s Private Bank in New York City as an analyst for three bankers with total net assets of \$6 billion. Afterwards, Izzy moved into portfolio construction and management as a Portfolio Assistant, covering \$1.5 billion in assets. She was then promoted to the role of Portfolio Manager where she managed more than \$650 million in discretionary assets for ultra-high-net worth individuals and families in addition to several institutional accounts. As part of her service to these accounts, Izzy managed equity, alternative asset and fixed income exposure, and provided custom portfolio solutions across all asset classes. As well, she specialized in analyzing outsized and non-actively researched stock positions for equity investment solutions, including active sales, diversification plans and alternative stock ideas, which reduced overall risk for client accounts. Izzy left her position at JPMorgan to attend graduate business school. She is very enthusiastic about returning to wealth management and providing HJ Sims with innovative portfolio solutions.

Izzy is based in the HJ Sims’ Austin, Texas office. She holds her Series 7 and 63 licenses. Izzy received her MBA from the McCombs School of Business at the University of Texas at Austin where she concentrated in Energy Finance. She received her B.A. from Yale University in Geology and Geophysics, and History of Art.