



COMPANIES IN MOTION

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At HJ Sims, the outcome is income

BY B.G. DOYLE

Operating in Puerto Rico and throughout the U.S., HJ Sims is a full-service financial services firm that specializes in fixed-income investing. “We are the champions of ‘entirement’—a singular approach that helps individuals generate income to meet their life goals by looking at the whole picture, their entire portfolio, lifestyle and family,” said Enrique Pascual, senior vice president at HJ Sims. “We are also one of the oldest underwriters of tax-exempt bonds in the U.S., with expertise in today’s fastest-growing sectors—senior living, healthcare, education and energy.”

Founded in 1935 when Herbert J. Sims & Co. was established on Wall Street, the firm has a long and solid legacy of investment expertise in helping clients generate income. “Our rich 75-plus-year history of investment expertise in helping clients generate income has not only resulted in a strong tradition of client confidence, but consistent growth as well,” he added, and pointed out that the firm’s income advisers average more than 24 years of expertise in generating income for their clients.

Having opened offices in Puerto Rico at Guaynabo’s Metro Office Park this year, HJ Sims also has offices in Connecticut, New Jersey, Maryland, Florida, Texas and Minnesota. Regarding this recent addition, Pascual said his firm is proud of its expanding footprint in terms of Private Client Group offices. “As we broaden our reach, our clients know that they always come first and their needs remain at the center,” he said. “Despite economic conditions throughout the decades, we continue to be known for our strong research and client dedication.” In the area of individual investing services, HJ Sims currently offers a wide range of services, including individual portfolio evaluation; assessment of long-term goals; full portfolio management; exclusive access to new bond issues; and a wealth of retirement expertise,



including pre-retirement financial and lifestyle planning and post-retirement income planning. Other solutions for this group of clients include a full range of investments, retirement products for individuals and corporations, education and health savings plans, wealth management, lending alternatives, and cash management.

When asked what motivates Pascual and his staff to keep this client-focused momentum going, he pointed to the high level of satisfaction experienced by HJ Sims’ clients. “Helping our clients have better lifestyles from the income we generate for them is a very rewarding experience for all of us,” he said. “We are experts at leading our clients through favorable and unfavorable financial environments with integrity, knowledge, sophistication, dedication and persistence, and not afraid to challenge the status quo.”

He also added that this mix includes providing creative ideas, approaches and techniques to help clients achieve their financial goals as well. “What sets us apart from the competition is our personal approach, with our primary responsibility aimed at providing clear, valuable and sound advice about our clients’ financial conditions, goals and environment,” he said. “And although we have experienced successful growth and expansion in recent years, we have done so with a measured approach and continue

to grow strategically as long as it benefits our clients and we continue to meet their income needs.”

Looking ahead, he noted that, as experts in fixed income with a specialty in senior living healthcare, education and energy, HJ Sims is well positioned to help clients respond

financially to the diverse market landscape and the impact of the island’s aging population. “Within the coming years, we see ourselves as a top-tier investment boutique firm experiencing continued growth and success in generating income for our clients in these areas,” he said. ■

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—Enrique Pascual, senior vice president at HJ Sims



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