



Sheila Collins

President / Senior Portfolio Manager

Sheila Collins has practiced within the financial services industry for 33 years. In 1978 she joined the Jacksonville office of Trikon Investments later named Sears Thompson Investment Group. She later purchased the firm and subsequently sold the firm in 2000. She is registered as an Investment Advisor Representative, a Registered Principal in general securities, a Principal in financial and operations, a Principal in limited municipals and a general securities representative.

Collins Capital Management, Inc. (CCMI) was established in 2002. In 2003 the firm registered with the State of Florida as a Registered Investment Advisor and subsequently registered with the Securities and Exchange Commission.

As chief investment strategist, Sheila Collins and her investment committee is responsible for the development of CCMI's portfolio investment strategies. Sheila is a member of the Jacksonville Chamber of Commerce and the Northeast Florida Green Chamber. She is also a former member of the American Society of Women Accountants, and an affiliate member of the CFA Institute and in 2008 she was awarded the Women of Influence Award from the *Jacksonville Business Journal*. In 2010 Sheila was designated a 2010 NABCAP Premier Advisor. She has served on the Board of Directors of Hubbard House, Brooks Health Foundation, Ribault Club Steering Committee, and Sheriff's Advisory Council.

Collins Capital Management, Inc.

What makes your practice different from all the rest?

We believe there is a permanent paradigm shift toward sustainability in all aspects of the global economy. Upon evaluation we felt it would be important to our clients to align ourselves with Impact investing. We felt compelled in 2010 to offer our clients the opportunity to invest in a socially responsible way by structuring a portfolio all inclusive of firms that meet our preset impact criteria. In 2010, CCMI was instrumental in the formation of the Northeast Florida Green Chamber offering support and insight to First Coast businesses and surrounding community.

Who is your ideal client?

Our firm culture blends well with entrepreneurs, owners, corporate executives and trust and estate planning.

Describe your customer service model.

We believe there is no substitute for character, integrity and the personal touch that we offer clients. Our advisory team provides our clients with a quarterly comprehensive performance review and annual investment planning review. We meet with our clients in good and difficult markets to provide them the broader view and to give them a sense of security in the decisions that we are making in their behalf. Our clients enjoy a client portal via our website along with electronic delivery of confirms, monthly statements, proxy notices and other data that would normally be delivered to their mailbox. We tailor the client experience to meet their expectations.

What is your investment philosophy?

With global economic instability and U.S. economic issues of government deficits, higher taxes, inflation, regulation, slow growth, high unemployment, and de-leveraging, mitigating risk and offering alternative investment strategies is key to our success.

Do you offer financial planning?

Financial planning is offered as part of our core wealth management service and some of the time this is a complimentary service. The distribution phase of financial planning is usually completed at no cost to the client.

Describe your risk management philosophy.

Risk parameters are determined by each client and then reviewed with the client on a quarterly basis. No less than annually an Investment Policy Statement is reviewed to determine if the client will continue under the same risk parameters. We have a diligent and ongoing process of research and quantitative analysis for each asset held by the client.

Define the added value of your services in relationship to your fees.

We felt it imperative to offer wealth management services that reflect the desire of the client to be in control of their financial future and to provide them a way of measuring their success. Offering SRI portfolio management is an additional service that allows the client to make some decisions and provides a measure of control and impact to their portfolio. The distribution phase of financial planning is also a complimentary service.

Collins Capital Management, Inc.

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Helen Rake, CFP®

Portfolio Manager

Helen has been in the financial services industry for 12 years and joined Collins Capital Management in 2004. She is a registered Principal, Portfolio Manager and member of the Investment Committee. In 2010 she developed the firm's Socially Responsible Model Portfolio along with tools to customize allocations according to environmental, social, and governance criteria. In 2011, Helen formed the Northeast Florida Green Chamber, and serves as President. The Green Chamber of the South concentrates its effort on supporting and promoting green and sustainable businesses on the First Coast. She is a member of the U.S. Green Builder's Council and the World Affairs Council.

Sheila Collins and Helen Rake, CFP® are Registered Representatives of and securities, advisory services, and certain insurance products are offered through INVEST Financial Corporation (INVEST), member FINRA/SIPC. Products offered are not FDIC insured, have no bank guarantee, and may lose value.

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