

A registered investment advisor located in  
Jacksonville, Florida offering managed accounts to a  
broad range of investors.



## What can Collins Capital Management do for me?

***We Provide a Broad Range of Services to help you reach your Financial Goals***

### **Fee Based Managed Accounts**

- Professional Asset Management
- Socially Responsible Investment (SRI) Strategies
- Detailed Performance Reports  
*Includes Market Benchmark Comparison, Industry Concentration Analysis, Consolidated Account Summary*
- International Exchange Trading & Currency Settlement
- Alternative Investment Choices
- Trust Services
- Charitable Giving Strategies
- Third Party Managers
- Private Wealth Management
- Private Funding Options
- IPO Access

### **Financial Planning**

- Financial and Retirement Planning
- Income Distribution Planning
- Estate Planning
- Insurance and Asset Protection Planning

### **Recordkeeping Services**

- Consolidated Accounts Regardless of Custodian
- Detailed Summary of All Accounts
- Tax Reporting with Gain/Loss Detail

### **Account Options**

- 24/7 Internet Access to Accounts
- Check-writing Privileges & Debit/ATM Card
- Householding (consolidates all account in one envelope for mailing)
- E-Delivery of Statements & Trade Confirmations

### **Value Statement:**

*We provide comprehensive asset management to affluent individuals, their families, businesses and foundations across the Southeast while emphasizing their individual risk tolerance and financial circumstances. We do this by utilizing high quality technology and the vast experience of our investment management team to develop tailored solutions through proprietary portfolio modeling.*

Securities offered through Triad Advisors Member FINRA/SIPC. Advisory Services offered through Collins Capital Management. Collins Capital Management is not affiliated with Triad Advisors. Certain additional services are provided through Fidelity Investments.

Investment holdings in our proprietary model portfolios are not FDIC-insured, may lose value and have no financial institution guarantees. Investing in any securities involves certain risks, including return and principal fluctuation and possible loss of principal.

**For more information about how you can benefit from our Investment Management services, call us at (904) 493-7500 or visit [www.collinscmi.com](http://www.collinscmi.com) today.**