

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



Who is Collins Capital Management?

An Innovative Wealth Management Firm with Strong Traditional Values

- An S.E.C. Registered Investment Advisor Firm offering fee-based accounts
- A privately owned company serving the Southeast based in Jacksonville, Florida
- An investment management Team with 135 + years combined experience
- An innovative asset manager that embraces the changing face of the investment landscape with tailored Socially Responsible Investment options
- A focused partner that utilizes proven, time-tested techniques to help you achieve a secure future
- An experienced advocate for charitable wealth transfer

What makes Collins Capital Management Different?

Holistic Asset Management

- Professionals focused on your investment success and not the bottom line
- No proprietary relationships - only our clients' best interests are considered
- Customized solutions based on a holistic planning approach
- A sophisticated, flexible trading platform encompassing domestic and international trading with choice of global currency settlement
- An understanding of Environmental, Social and Governance (ESG) issues
- A focus on creating intergenerational wealth strategies and charitable giving
- Experience and expertise usually reserved for only the wealthiest individuals
- Pioneering proprietary modeling using fundamental and technical research
- Industry leading technology that provides unprecedented transparency
- Exceptional client service every time

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.

Investment holdings in our proprietary model portfolios are not FDIC-insured, may lose value and have no financial institution guarantees. Investing in 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 today.