



Your Goals. Our Strategies.

**TOGETHER, BUILDING LASTING LEGACIES.**

Integrated financial guidance and investment management solutions delivered with the special care, attention, and high tech resources needed to protect and grow your wealth for the future. Heck Capital invests, consults, and advises to over \$6.7 billion of assets while servicing client relationships in 38 states.\*



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# Integrated Financial Guidance and Investment Management



**LEGACY INVESTING.** Heck Capital helps clients manage their wealth for life and legacy. We build on our deep experience to help guide your decision making and ensure your wealth and values are seamlessly transitioned to future generations. Heck Capital's high client retention is measured by the strength of every client relationship, from the local individual and family to the prominent national institution; together, we will build your investment legacy.



**HIGH TOUCH. HIGH TECH.** In today's fast-paced world, there's no replacement for sound, personalized investment guidance. At Heck Capital, we meet regularly with all of our clients to ensure we stay up-to-date on your circumstances so we can make appropriate modifications to your plan if and when things change.

To keep you connected to your financial standing and goals, our **CapitalCENTRAL<sup>®</sup> 24/7** technology helps you organize all financial objectives and collaborate across multiple relationships using our integrated, online dashboard. You'll receive a 360 degree view of your financial life with 24/7 access to all your important financial data.



**LONGSTANDING INVESTMENT FOCUS.** The management or consulting of your institutional portfolio or corporate account structure requires a disciplined process including comprehensive, independent research and a long-term, institutional-quality investment approach. Based on your unique situation, we will address your key financial impact points. Heck Capital will research and identify how we can improve your investment strategy including your risks, costs, and objectives.

## CONTINUOUSLY INVESTING IN OUR SERVICES, TECHNOLOGY, AND PEOPLE

**CapitalCENTRAL<sup>®</sup> 24/7** helps you organize your financial life within your own integrated financial portal. Access your personal financial website from wherever you are and on any device you choose. You can collaborate across multiple family members, advisory relationships or corporate accounts using one integrated financial dashboard.



*Your integrated financial portal*

**Dashboard:** An aggregated view of everything you own/owe, across all of the financial institutions you work with.

**Investments:** Interactive charts and detailed summaries.

**Vault:** Receive and store monthly statements and investment reviews in addition to personal documents.

**Spending:** Track spending habits and monitor cash flow.

**Budget:** Set budgets and keep track of progress.

**For more information, visit our website: [www.heckcapital.com](http://www.heckcapital.com)**