

HELLER CAPITAL RESOURCES GROUP

Has Been Selected as a 2011 FIVE STAR Wealth ManagerSM



Left to right: Back row: Dave Hindler, Jeremy Drake
Front row: Steve Weinberger, FIVE STAR Wealth Manager Greg Heller

Our Goal Is to Understand and Meet the Financial Goals and Objectives of Each of Our Individual Clients

- Customized and adaptable wealth building and investment strategies
- Specialize in life transition planning; pre-retirement, divorce, estate and business succession
- Highly personalized concierge-level service and expert advice

Areas of Focus: Financial Planning, Investment Advisory, Retirement, Tax and Insurance Planning, and Business Consulting
Designations CFP®, CA Certified for Life Insurance, Securities Licensed with FINRA, MBA

Heller Capital Resources is a boutique investment management firm with a history of providing individually tailored and trustworthy wealth management. On this foundation, we provide personalized financial advice and services to help each individual reach his or her goals. Heller Capital Resources takes a full-service approach to financial planning, offering expert advice and education to each of our clients. Our advisors understand the need for adaptability and have the experience and education it

takes to help individuals make sound choices in today's changing market. Our primary areas of expertise include investment/portfolio management, retirement, tax and insurance planning, and business consulting. Clients include high-net-worth individuals and businesses who have selected Heller Capital on the basis of referrals from existing clients, friends and other professionals. At Heller Capital we know our greatest assets are our clients; therefore, our goal is to understand and meet your goals.



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