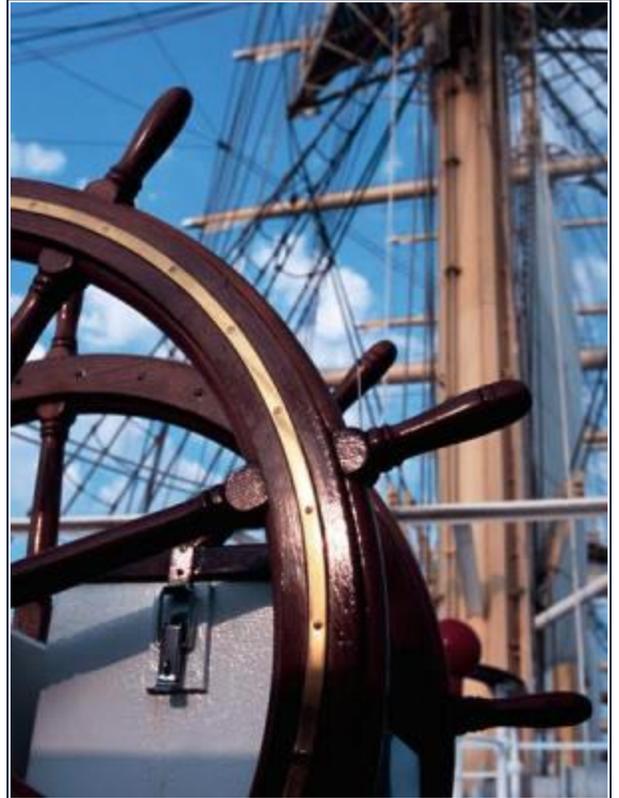


[Home](#)

## Welcome to Helm Investment Management

Whatever the size or function of any craft on the sea, the helm is the primary steering mechanism from home port to the final destination. Helm Investment Management, LLC concentrates on serving individuals, families, and foundations who can benefit from highly customized investment decisions based on a well-rounded assessment of their financial assets, goals and risk tolerances.

In many ways, constraints such as income and estate tax issues make investing for individuals and families more complex than investing for large institutions. Whereas institutions typically arrange for their investment assets to grow tax-free or tax-deferred, individuals and families often face a complex array of taxable and tax deferred accounts, such as 401(k)s, family and/or charitable trusts and college savings plans. Ever-changing estate, trust and income tax laws make matters even more complex for many families.



Helm is part of a larger office made up of independent firms including estate planning and tax professionals. This allows for an unusually sophisticated and interdisciplinary approach to the complexities of investing our clients' mix of taxable and tax-deferred assets, helping them to optimize risk-adjusted total returns.

We provide only fee-based investment advice, focusing on growing client assets in a manner suitable to each client's short and long-term goals and risk tolerances. Clients often have several different investment portfolios. We normally maintain a number of distinct accounts for each client, each with a unique objective and purpose. Together, these separate accounts relate to that client's coordinated financial plan. Helm selects and matches optimal investments and strategies for each portion of the overall asset mix to help clients achieve their financial goals in a low-cost, efficient manner. Our overall goal is a comprehensive and unified portfolio. Working with an agreed-upon investment policy and taking into account specific client and account constraints, Helm develops a carefully tuned, diversified portfolio that serves clients by reducing overall portfolio risk and minimizing the consequences of market volatility that can result from concentration in any one asset class.

The broad expertise of the principals, Jay McCormick and Peter Quinn, in financial planning, numerous equity and fixed income asset classes, and domestic and international investing help Helm clients steer a steady course

through the constantly changing sea of investment choices. Through regular face-to-face meetings and other communications, we keep clients as in touch as they want to be with their investment portfolios.

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