Investment Advisors + Financial Consultants

> “We help you to reach your goals with tailored solutions that meet your needs.”

— HEBER FUGER WENDIN

Heber Fuger Wendin (HFW) is an independent, fee-only financial advisor and investment counsel firm established in 1934.

LATEST NEWS

Download today’s market data directly from Heber Fuger Wendin.

Our services include bank investment and credit union investment advisory services, portfolio accounting, mortgage servicing rights valuation, asset liability and other financial consulting services.

We currently manage over $4 billion in assets for over 100 clients throughout the Midwest and Southern United States. In addition to community banks and credit unions, our investment advisory clients include insurance companies, hospitals, foundations and individuals. As a fee-only Registered Investment Advisor, we take no commissions; this allows us to provide more independent and objective advice for our clients. We are a fiduciary, not a broker, which means we place our clients' interests first – ahead of our own.

NOTE TO CLIENTS: *NEW* Our ADV report for 2018 is now available. To find it, please access the Client Info under Client Account on the upper right of this screen. Our approved broker list is available there as well. Just give our office a call if you need the password.

View Today's Market Update (/todays-market-update)

Monthly Newsletters

READ NEWSLETTER (/CLIENT-INFO)

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Heber's Value Proposition:

Trust, integrity and accountability. Heber provides tailored investment portfolio solutions that meet each client's unique needs. We are a registered investment advisor with a fiduciary duty to act in your best interests – we put your interests first. We are accountable to our clients – we say what we do and we do what we say. We built Heber on integrity and trust, because doing what's right for you is better for our business in the long run. This is why we're one the oldest, most well—established investment advisory firms in the United States.

Our Services

Investment Advisory Services (/investment-advisory-services)

Our clients count on us for prudent financial advice, objective portfolio management and a long-term relationship built on integrity, confidentiality and trust. Our highly educated and experienced staff spends the time to understand each client and their unique needs.

Investment Portfolio Accounting (/investment-portfolio-accounting)

A cloud-based, highly secure investment accounting and portfolio management system provides concise management information for community banks, credit unions and insurance companies. Our system accurately calculates all types of securities, even complex CMOs.

Investment Counsel For Individuals (/investment-counsel-for-individuals)

To meet the many requests from individuals seeking objective, professional investment counsel, we have created HFW Compass* Personal Wealth Management Solutions and Service so that we may provide the same professional investment counsel to individuals and their families.

Mortgage Servicing Rights Valuations (/mortgage-servicing-rights-valuations)

HFW provides banks and credit unions a low cost valuation model that calculates the value of mortgage servicing assets. The mortgage servicing rights ("MSR") value is a present value of the future income stream attained from mortgage servicing fees, ancillary income from processing mortgage and

Asset/Liability Management Consulting (/assetliability-management-consulting)

HFW's low cost asset/liability consulting services for community banks and credit unions encompass a review of all facets of the asset/liability committee's responsibilities including policy review, ALCO reports and worksheets. HFW

Independent, Third Party Interest Rate Risk Reviews (/independent-third-party-interest-rate-risk-reviews)

To satisfy state and federal regulatory requirements, HFW provides community banks and credit unions annual or ad-hoc independent, third party reviews of their interest rate risk models.

related payments, delinquency effects and overnight income of processing “float.”

ensures policy compliance with regulations and enhances reports and worksheets so that interest rate, credit, liquidity, operational and reputational risk are tracked, managed and reported.

Let's Chat.

We at Heber are honored to be the stewards of an 85 year-old investment counsel firm with many long-term clients; our oldest client relationship dates to our founding in 1934.

We look forward to our next 85 years. Consider becoming a Heber client – and look forward to *your* next 85 years. Call us at 248.258.6866 (tel:248-258-6866) or send us an email below and we will be in contact with you shortly.

Name *

First Name

Last Name

Email Address *

Phone

(###) ### ####

How Can We Help? *

SUBMIT

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