Colliers
Securities

Wealth Management

Personalized strategies developed by experienced professionals who understand the financial markets.

For over 40 years we have delivered wealth management solutions tailored to each client's financial needs. Our experienced financial advisors and relationship professionals work closely with our clients to determine the best alternatives and solutions for their financial goals for every stage of life.

From choosing a specific investment product to developing a comprehensive financial plan, our knowledgeable and responsive investment professionals work with individuals and families to deliver customized financial solutions to meet their needs. Our clients value our depth and range of experience, as well as the array of competitive products and services our platform allows to meet their investment objectives:

- Fixed Income and Equities
- Mutual Funds
- Annuities
- Insurance
- Retirement and Financial Planning
- Fee-based Accounts and Professional Separately Managed Accounts

Additionally, we deliver unique **fixed income solutions** and access to our proprietary equity research for our individual investors. Colliers Securities has a rich history in public finance and is a leader in structuring taxable and tax-exempt bond issues for charter schools, economic development agencies, health care/senior living, local and state governments and public utilities. In addition, our Equity Capital Markets division uncovers valuable investment ideas and strategies using proprietary research for both retail and institutional investors.

Investments	Insurance	Retirement Plans	Planning Services
Bonds	Disability	401(k), 403(b) and profit sharing	Education Savings
Stocks	Variable and Term Life	Traditional and Roth IRAs	Asset Preservation
Mutual Funds	Health	Simplified Employee Pensions (SEP)	Personal Financial Planning
Managed Accounts	Long-term Care	Non-qualified deferred compensation	Trusts and Estates
ETF/UIT			
Annuities			
REIT			

Open Platform

Extensive financial options and opportunities are provided through our open architecture investment platform. Unlike some companies, we are able to access a variety of financial vehicles without limiting the investment management selection to only one product provider. That means we can draw upon the vast resources of the best investment minds and strategies to deliver appropriate investment solutions for our clients. With the financial markets becoming increasingly sophisticated, open architecture has evolved as a way for investors to access the ever-widening range of asset classes.

Colliers

Securities

We put our clients first and succeed when they succeed.

Our Approach

We value the confidence our clients place in us. In return, we aim to deliver customized financial alternatives and solutions with personalized customer service. Our philosophy is simple. To reach a desired outcome, investors need access to quality products, to diversify their assets and to maintain a long-term perspective. Our professionals identify financial products that help achieve these goals. Quality matters and we believe the financial vehicles and services we recommend offer the potential for consistent performance over time – through good and bad markets. Our advisors provide one-on-one service, listen to our clients' needs and offer a personal assessment in language that is easy to understand.

Working With Us

We succeed when our clients succeed. Our primary objective is to serve our clients to the best of our abilities. We hold ourselves to the highest ethical standards and insist on conducting our business the right way. It's not only what we do but how we do it that helps ensure our clients' success. Our commitment to integrity and putting clients first enables us to build relationships based on honesty and trust.

We know you have many alternatives within the financial services industry. At Colliers Securities we believe the first step toward reaching financial goals is to thoroughly understand what they are. In fact, our job is to make investing and financial planning as simple and as easy as possible. Our clients' success is not measured just by current financial well-being, but also by how confident they feel about their future. We take an objective approach to each client's situation to help them understand where they are and where they want to go. We design solutions to meet those unique objectives and routinely review them with clients to ensure they are attaining their desired outcomes for every stage of your life.

To simplify managing your account with us, Colliers Securities offers a full range of portfolio management services via the Internet. Our secure, password-protected client account portal gives users access to on-line account statements, confirmations and tax documents, charts and reports to track portfolio performance, comprehensive market data, commentaries and wireless alerts through email or cell phone.

Contact us to learn more about the products and service we provide to help you reach your financial and investment goals.

Contact Us

Arizona
Queen Creek, AZ
356 West Corriente Court
Queen Creek, AZ 85143
Phone: 480-888-7155

Minnesota
Detroit Lakes, MN
611 Summit Avenue
Detroit Lakes, MN 56501
Phone: 218-844-3825

Minneapolis, MN
90 South 7th Street
Suite 4300
Minneapolis, MN 55402
Phone: 612-376-4000

North Dakota
Bismarck, ND
120 North 3rd Street
Suite 150
Bismarck, ND 58501
Phone: 701-222-4411

Fargo, ND
3170 43rd Street South
Suite 105
Fargo, ND 58104
Phone: 701-356-9300

South Dakota
Mitchell, SD
721 West Havens Avenue
Mitchell, SD 57301
Phone: 605-990-6300

Sioux Falls, SD
110 South Phillips Avenue
Suite 203
Sioux Falls, SD 57104
Phone: 605-339-2300

Watertown, SD
119 5th Street NE
Watertown, SD 57201
Phone: 605-882-1200

Member SIPC/FINRA

colliers.com