

# HÉBERT

## ADVISORY SERVICES, INC.

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**Disciplined Portfolio Management**      *INSTITECH® Technical Stock Market Research*

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Hébert Advisory Services is an independent money management and stock market research firm specializing in separately managed accounts. As a second generation; family owned and operated Registered Investment Advisory firm we have been producing and publishing our *INSTITECH®* research since 1968 and successfully managing equity portfolios since 1975.

*Our belief:*

Investor's long-term goals can best be served by equity ownership of viable business enterprises and that common stocks provide the greatest opportunity for investment growth.

*Our mission:*

Provide our clients with profitable, better than market returns,  
maximizing long-term capital appreciation.

*We achieve this with active portfolio management using our INSTITECH® Research.*

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*INSTITECH®* was created and developed in the early 1960's by Howard Hébert. Dissatisfied with the limited stock market research available, Howard recognized the need for an investment tool that used a non-emotional approach. Convinced that he could remove a considerable portion of subjectivity involved with stock picking, he built the *INSTITECH®* research process.

Timeless in its application, *INSTITECH®* provides an accurate *description* of current market conditions as well as specialized individual stock price analysis.

This proprietary Comparative Relative Strength analysis answers the question:

*"Is this particular stock over or under performing the market and if so – by what degree?"*

With this technical answer in hand we overlay independent fundamental research and build solid, broadly diversified portfolios with long-term performance at reasonable risk.

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## *Meet the Hebert Advisory Executive Team...*

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### **Richard Hebert, MBA**

*President, Portfolio Manager, CIO.*

Rick joined the firm in 1999 specializing in portfolio management using the company's proprietary technical stock market analysis. As Chief Investment Officer he directs overall portfolio management strategy and execution. He has over twenty-five years of senior executive experience in financial and business management within the industrial and financial sectors. Rick earned an MBA, Honors, Finance emphasis, and BS, BA in Finance, Cum Laude from Regis University. He is a member of American Mensa, LTD, American Association of Individual Investors and the Rotary Club of Golden.

### **Kimberly (Kiki) Deane**

*Vice President, Portfolio Manager*

Kiki joined the firm in 2008 with an extensive background in Investment Management and Institutional Trust business. As a securities industry professional since 1988, Kiki brings substantial portfolio management and operational experience to the company. She leads the fixed income portfolio management efforts along with supervising overall client account management activities. Kiki is active in the Golden community serving on the Board of Directors for Foothills Art Center and Jefferson Symphony Orchestra.

### **Janiece (Jan) Kray**

*Vice President Systems Administrator*

Jan joined the firm in 2006 as Systems Analyst with over thirty years of IT consulting and computer experience work with business and national non-profit organizations. Jan earned her BS in Technology Management, Cum Laude from Regis University. She serves as Publicity Chairman of Buffalo Bill Saddle Club and as Equestrian Patroller for Jefferson County Open Space.

### **Jason Hebert**

*Operations Manager*

Jason joined the firm in 2011 with considerable experience in senior executive management and overall company administration responsibilities. He leads and manages the firm's operational, back office and client administration functions. Jason is involved in youth activities and volunteers in the Adams 12 School District and is a youth mentor and coach in the Broomfield Football, Baseball and Hockey leagues.

### **Robert Short**

*Director Business Development*

Bob joined the company in 2008 with over 30 years of extensive experience in the financial services industry as a national mutual fund sales manager, sales trainer and compliance officer. As President of his firm, Waverly Spencer, Bob and his team lead the sales, marketing and business development efforts at Hebert Advisory. Bob is very involved in the local community serving on the Red Rocks Community College Foundation Board, the Guaranty Bank Advisory Board, and is the founder of the Golden Rotary Club's Ethics in Business Annual Awards program.