Horter
Investment Management, LLC

A FOUNDATION FOR SUCCESS

LOW RISK & LOW VOLATILITY PORTFOLIOS

At Horter, we believe in providing our clients with low risk and low volatility portfolio management. Through our unique Retirement Designed Money Management System, we look after our clients by providing them with low risk and low volatility to protect what they've worked so hard to build. We help retirees secure a better retirement through fee-based asset management, always ensuring their individual needs remain our top concern. We have access to a platform of exceptional Private Wealth Managers unavailable to many smaller independent advisors and larger brokerage firms.

EXPERIENCED MONEY MANAGEMENT

We have been a leader in the financial services industry for over 30 years, a Certified Financial Planner since 1986, and an RIA for over 22 years. We may not have seen it all, but we have seen a lot. Our clients value us for our ethics, knowledge and value system centered around our proven track record of providing low risk money management. Horter Investment Management, LLC currently manages over $1B in assets under management in 44 states with 200+ advisors.

RETIREMENT DESIGNED MONEY MANAGEMENT TEAM

Drew K. Horter
Founder & Chief Investment Strategist

With over 30 years of investment management experience Mr. Horter has extensive industry knowledge as a Registered Investment Advisor. Horter Investment Management, LLC was founded in 1991. Mr. Horter has been CFP™ since 1986 and has been quoted by Fox Business News, The Wall Street Journal, Investment News and the Chicago Tribune.

Kirk R. Horter
Director of Operations

Kirk has been instrumental in developing a Low Risk Private Wealth Money Management Platform for Horter Investment Management, LLC. In addition to overseeing Trading, Account Reconciliation and ACAT Transfers, Kirk also analyzes the Portfolio Managers that meet the performance standards, risk tolerance, and low risk money management criteria that Horter Investment Management mandates in it's managed portfolio.

Judy Helmes-Sneed
Director of Technology & Business Development

Ms. Helmes-Sneed has worked in the field of Systems Management and Accounting for over 30 years and the field of Compliance for 6 years. General responsibilities have included various aspects of business management. Her areas of concentration are technology and business development including software implementations, database maintenance and software/database conversions. Other areas of business have included compliance, financial statements, general ledger, tax preparation, payroll, budgeting, advertising, insurance, inventory control, employee benefits and disaster recovery

Jack Peters
Vice President of Sales

Jack is responsible for advisor recruiting and training. This includes brokerage statement analysis, tax return opportunities and implementing the Horter Investment Management, LLC low risk, and low volatility investment management platform. Jack travels throughout the United States presenting the Horter Investment Management, LLC platform to Advisors who desire to be a Fiduciary for their clients.

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