



In Honor of
BILL SIMS
Managing Principal
HJ Sims & Co.

Bill grew up in Connecticut and graduated from the Hotchkiss School in Lakeville, Connecticut.

He received his Bachelor of Arts degree from Yale University in New Haven, Connecticut. Bill attended Stanford University Graduate School of Business in Stanford, California and earned his Master of Business Administration degree from New York University.



Yale University



Bill briefly worked at Merrill Lynch as a liaison between nationwide branch offices working with the underwriting and trading departments in New York City. He had a solid understanding of the upward and downward cycles of the bond market and soon after joined his father at the family business in 1973. Bill's father founded Herbert J Sims & Co. in 1935 during the Great Depression. HJ Sims & Co. is one of the nation's oldest underwriters of tax-exempt bonds. Bill continues his father's successful business model, gaining valuable insight into a variety of public sectors, including senior living, hospitals, natural gas systems, roads, bridges and other infrastructure. Bill became an expert on the many aspects of the senior living and nursing home industry as well as the real estate markets. Eventually, Bill focused on the senior living sector at HJ Sims while his father retained leadership of the hospital business. He is highly skilled at marketing senior living bonds and has an innate talent for numerical calculations. He has extensive experience restructuring and refinancing distressed properties as well as mergers and acquisitions. Bill is nationally recognized for his expertise in the senior living industry, where he has overseen the financing of hundreds of projects since joining the firm. Since 1965, HJ Sims has provided well over \$16 billion in senior living financing.



One of Bill's many professional achievements is the refinancing of Hebrew Senior Life's NewBridge on the Charles in the Boston metropolitan area,



making it the largest start-up Life Plan Community (CCRC) ever financed and the largest Life Plan Community ever refinanced at that time.

In 2005, Bill was honored by Aging in America Inc., a not-for-profit organization dedicated to providing support to individuals and organizations in need of assistance with long term care services. He was recognized in 2008 by The Miriam Osborn Memorial Home Association for his valuable contributions to the senior living industry. He is a past Chairperson and current Board member of Jewish Senior Services in Bridgeport, Connecticut. Bill continues to stay active in the investment industry as a highly regarded speaker and is the author of numerous articles. He has been married for 40 years and is the proud father of two daughters, Elizabeth (Izzy) and Amanda. Izzy joined HJ Sims in 2013 and currently serves on the senior leadership team. Bill and his wife have been married for over 40 years and reside in Connecticut. In his free time Bill enjoys sailing small boats.



“Bill has demonstrated that you can grow a successful company by creating a culture grounded in principled, ethical decision making and the singular focus on striving to do the right thing for both our clients and our employees. Bill’s moral compass is exceptionally strong and serves as a guide for all of us at HJ Sims.”

– Aaron Rulnick, Managing Principal, HJ Sims & Co.