



Heron Bay Capital Management Celebrates Five-Year Anniversary with over \$600 Million in Assets Under Management

BLOOMFIELD HILLS, MI, UNITED STATES, May 19, 2025 /EINPresswire.com/ -- Heron Bay Capital Management, an independent registered investment advisor, today announced it has reached its five-year anniversary milestone with over \$600 million in assets under management since its founding in January 2020. In addition, multiple firm strategies have received recognition as a PSN Top Gun, an industry designation for investment performance excellence.

The Michigan-based firm, which launched immediately in advance of the onset of the COVID-19 pandemic, has established itself as a boutique investment manager specializing in separately managed accounts for institutional investors, family offices, and high-net-worth individuals.

"Launching during a global pandemic presented unique challenges, but it also created an opportunity to execute on our investment discipline" said Gerald Seizert, Managing Partner. "We've demonstrated that an independent firm with a clear focus on identifying high-quality businesses can navigate volatile markets effectively. Today, we serve clients all over the country with our investment strategies in an aligned business model."

Heron Bay's investment philosophy is distinctly bottom-up, investing in high-quality, well-managed businesses that trade at a discount to intrinsic value. The firm targets competitively-advantaged businesses with high and stable returns on capital employed that can be sustained for the long term. The firm manages concentrated strategies that aim to compound shareholder wealth by investing in businesses that can thrive over complete business cycles. "We are business analysts at heart," said Paul Seizert, Chief Operating Officer. "We believe our disciplined investment criteria and concentrated portfolios offer attractive long-term risk-adjusted returns."

The firm has thoughtfully brought together a team with strong institutional asset management experience and prioritized advanced technological and research skills. Heron Bay has built a solid foundation by focusing on company culture, investment processes and portfolio implementation, as well as setting high standards for operations and client service.

For more information about Heron Bay Capital Management, visit www.heronbaycap.com.

About Heron Bay Capital Management

Founded in 2020, Heron Bay Capital Management is an independent, employee-owned registered investment advisor based in Bloomfield Hills, Michigan. The firm manages approximately \$600 million in client assets through separately managed accounts across six equity strategies. Heron Bay's investment philosophy is rooted in owning high quality businesses that are trading at a discount to intrinsic value based on repeatable quantitative and qualitative investment processes that focus on cash flow generation and resource efficiency.

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