Heron Bay Capital Management Surpasses $1 Billion in Assets Under Management

Heron Bay Capital Management announced it has surpassed $1 billion in AUM, achieving this significant milestone in just over six years since inception.

BLOOMFIELD HILLS, MI, UNITED STATES, February 24, 2026 /EINPresswire.com/ -- Heron Bay Capital Management (HBCM), an independent registered investment advisor, today announced it has surpassed $1 billion in assets under management (AUM), achieving this significant milestone in just over six years since the firm's inception.

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>
> *Paul Seizert*

This achievement represents a major validation for HBCM as an independent firm in an increasingly competitive investment management landscape. The independent RIA model has gained significant traction in recent years as investors increasingly seek advisors who operate free from conflicts of interest inherent in traditional broker-dealer or wirehouse structures. HBCM's growth trajectory demonstrates the continued strength of this model and investors' preference for fiduciary-focused advice.

"Reaching $1.4 billion in AUM is a testament to the trust our clients have placed in us and the dedication of our entire team," said Paul Seizert, Chief Operating Officer of Heron Bay Capital Management. "This milestone validates our independent approach and our unwavering focus on putting clients' interests first. We're honored that our clients – individuals, institutions, and other RIAs – trust the firm to deliver our consistently applied research process."

According to recent industry data, fewer than 10% of the approximately 15,000 registered investment advisors in the United States manage $1 billion or more in assets. This places HBCM among an elite group of firms that have achieved this scale, and doing so within six years makes the accomplishment particularly noteworthy in an industry where building trust and growing assets typically takes decades.

Looking ahead, Heron Bay Capital Management remains committed to maintaining the personalized service and investment excellence that have defined its first six years while continuing to expand its capabilities to serve clients effectively at this new scale.

About Heron Bay Capital Management
Heron Bay Capital Management is an independent registered investment advisor committed to providing investment management services. Founded in 2020, the firm serves individuals, institutions, and other registered investment advisors with a focus on concentrated, high quality equity portfolios. For more information, visit www.heronbaycap.com or contact Tammy Micakovic.

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