ARE WE A GOOD FIT FOR YOU?

YOU WANT TO SIMPLIFY YOUR FINANCIAL LIFE

Bringing your financial plan, estate plan, taxes, wealth and other financial elements under one roof appeals to you. Working with someone who can help you understand and manage all of these areas without making it seem overwhelming would go a long way toward simplifying your financial life.

YOU WANT AN OBJECTIVE, EXPERIENCED ADVISOR

You don't want to be sold products or self-serving advice. What you do want is an advisor who has experience and who looks out for your best interests (not their own pocketbook). This means a clear fee for services, not commissions based on trades and not add-on products with additional costs. Working with the same person year-after-year is important. You don't want new advisors to have to "get to know" you over and over.

YOU WANT TO BE EDUCATED AND INFORMED

You want to be involved in the development of your financial plan, but you also want to keep up with your progress and with your investments on a regular basis. While your goal is to work with an advisor who handles the day-to-day responsibilities, you do want to know what's changing, when and why. And if you get off track, you want an advisor who can steer you in the right direction.

YOU HAVE ACCUMULATED WEALTH

You have accomulated investable assets of $1M or more and are interested in preserving or growing it. Goals for the use of your wealth may include retirement, transferring to the next generation, endowing a charity, providing education for children or grandchildren or any number of purposes.

YOUR TIME IS PRECIOUS

Whether you're running a business, a household or both, you have little time to spend on the day-to-day monitoring of your wealth. At the same time, you want to be aware of where you stand; regular, understandable reporting that lays out your progress toward your goals is important to you. The availability of your advisor by phone, email or in person is also important. When you have questions or need help, you need it quickly.

If this describes you, chances are we will be a good fit. Learn more at www.smithhowardwealth.com.

Call us at 404.874.6244.

SMITH & HOWARD
WEALTH MANAGEMENT

Your family's CFO