



William D. Smith, CFP[®], AIF[®],
AEP[®], RICP[®], LUTCF, CLTC

Advanced Planning Advisor

8816 Six Forks Road
Suite 301
Raleigh, NC 27615



Videos

We have interesting videos for you to watch on my site.

[View Videos](#) »

Our Team

Learn more about our experienced team.

[Learn More](#) »

Media

Learn more about us by listening to a recent podcast or reading a blog post.

[Read and Listen](#) »

Patience. Vision. Leadership.



As an active and interested member in our great community, I am very proud to represent my clients as they reach for their financial goals and dreams. Whether meeting with an individual, family, or business, I make it a point to do something that has become somewhat of a lost art these days: listen. When I'm doing less talking and you're spending more time sharing your intentions and goals with me, we're able to make true progress.

Whether you're interested in wealth accumulation or protection, you can rest assured that our client-centered approach is one that can not only benefit you, but also the forthcoming generations that depend on the financial decisions that you make today.

Thank you for your interest in my website and please feel most welcome to [contact me](#) for additional information or to schedule a meeting.

Pardon the inconvenience, but our servers have detected a high number of errors from your connection. To continue, please verify that you are a human:



I'm not a robot

reCAPTCHA
Privacy - Terms

Leaving Your Employer? Don't Forget Your Retirement Savings Plan

When leaving your employer you'll need to decide what to do with the money in your retirement savings plan.

[More Videos »](#)



8816 Six Forks Road, Suite 301 - Raleigh, NC 27615 - (919) 546-0400

Securities and advisory services offered through Royal Alliance Associates, Inc. (RAA), member [FINRA](#), [SIPC](#). RAA is separately owned and other entities and/or marketing names, products or services referenced here are independent of RAA. Representatives may not be registered to provide securities and advisory services in all states. RAA does not provide tax or legal advice.

This communication is strictly intended for individuals residing in the states of CA, NC, SC. No offers may be made or accepted from any resident outside the specific state(s) referenced.

[Privacy Policy](#)

PLEASE NOTE: The information being provided is strictly as a courtesy. When you link to any of the web sites provided here, you are leaving this web site. We make no representation as to the completeness or accuracy of information provided at these web sites. Nor is the company liable for any direct or indirect technical or system issues or any consequences arising out of your access to or your use of third-party technologies, web sites, information and programs made available through this web site. When

you access one of these web sites, you are leaving our web site and assume total responsibility and risk for your use of the web sites you are linking to.

[Check the background](#) of this financial professional on FINRA's [BrokerCheck](#)