

PROVIDING FIDUCIARY FINANCIAL ADVICE FOR OVER 35 YEARS

VIEW A 2-MINUTE OVERVIEW OF OUR FIRM

VIEW OUR 2-MINUTE
OVERVIEW

OUR
APPROACH

COST OF OUR
SERVICES

MEET OUR AWARD-WINNING*
TEAM

YOUR PLANS. OUR PRIORITY.

At M.J. Smith & Associates, we help our clients create financial and life plans that reflect their unique situations while supporting and celebrating their hopes and goals. Our goal is to help you lead the life you choose by providing the competent, ethical financial advice you may need to be successful in today's volatile markets.

Our professional team of advisors is experienced at integrating tax¹, investment, and financial strategies into thoughtful, holistic financial plans. In addition, as a Registered Investment Adviser, we act as fiduciaries, placing our clients' best interests ahead of our own.

Ready to take control of your financial life? We are ready to help. Get started by scheduling a complimentary,



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With our holistic approach, we strive to be not just your investment planner, but your complete wealth management partner.

Our full concierge service guides you through the required intricacies of your unique personal plan.

Questions? We look forward to hearing from you.

OUR SERVICES

COST OF OUR SERVICES

CONTACT US



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