





David Smith Advisory (/)

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(/process)

VIDEO LIBRARY (/VIDEO-LIBRARY)

OUR PROCESS (/PROCESS)

You're *not* everybody.

We get that, and we recognize that the usual approach of compressing your distinct needs and goals into a standardized financial plan simply doesn't suffice.

That's why we're not *for* everybody.

Our services are designed for those who want personalized service and customized wealth management solutions...

...who favor scientifically sound recommendations grounded in historical evidence over speculation...

...who see the value in planning ahead with holistic strategies that maximize long-term security...

...who desire stable relationships with dependable advisors who are committed to your end game...

...and who prefer the lower expenses affiliated with passively managed strategies over the high costs associated with actively managed accounts.

If this speaks to you, then you've come to the right place.

Welcome to David Smith Advisory

- Investment Planning
- Portfolio Refinement
- Wealth Advisory
- Wealth Transfer
- Charitable Giving

Let us help you get the most from the life you've built.

David Smith Advisory is headquartered in South Miami, Florida and managed by David Smith, a Certified Financial Planner (CFP®) with more than 20 years of experience in helping individuals like you achieve long-term investment goals.

[See why David Smith Advisory is right for you.](/why-us) (/why-us)

**WANT TO STAY INFORMED?
Sign up for our newsletter:**


**QUESTIONS?
CONTACT US TODAY**

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