

## Services



### Financial Planning

We offer a broad range of wealth management and financial planning expertise, including retirement and estate planning, insurance strategies, tax planning and college saving.



### Portfolio Management

Our investment portfolios are constructed utilizing a fundamental security selection process that has been used by our investment professionals for over thirty years.

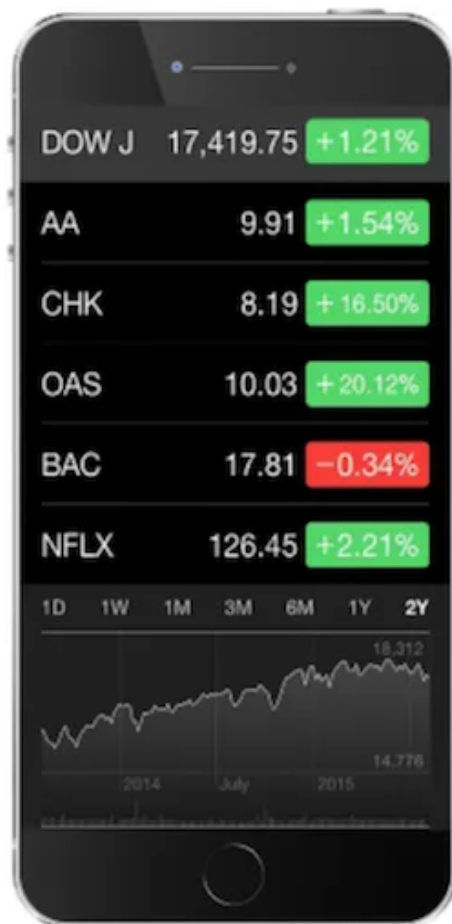


### Our Goal

Our goal is to deliver outstanding investment results and service to our clients and create long-lasting relationships by putting the interests of our clients first.

'Smithbridge has provided the same time-honored, personalized investment service, with integrity and expertise, for 20 years. We pride ourselves on maintaining rewarding, long-term relationships with our clients.'

## Investment Philosophy



## By The Numbers

20+

years of superior  
results and service  
to our clients

200M

currently under  
management

70%

of our clients have  
been with us over  
10 years

100+

years of  
experience,  
knowledge, and  
wisdom

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# Send Us A Message

Your Name

Your Email

Your Message

SEND MESSAGE