A Powerful New Way To Experience Sound Mind Investing

PROFESSIONAL MANAGEMENT

- Portfolios implement the Sound Mind Investing strategies.
- Accounts proactively monitored by a team of Chartered Financial Analysts (CFA).
- Securities strategically allocated in accounts to improve tax efficiency.
- Tolerance band portfolio rebalancing across all of your accounts.
- Tax-loss harvesting utilized in taxable accounts.

Learn More

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WE CAN MANAGE MOST ACCOUNT TYPES

Including Joint, Individual, IRA's (Traditional/ Roth/ SEP/ SIMPLE IRA), 401k Rollovers, 403b Rollovers, HSAs, and more!

	CLASSIC	SELECT	PREMIER
	$2,500 MINIMUM INVESTMENT *(Per Account)*	$250,000 MINIMUM INVESTMENT *(Per Household)*	$1,000,000 MINIMUM INVESTMENT *(Per Household)*
	LEARN MORE	LEARN MORE	LEARN MORE
SMI Strategies			
Stock Upgrading			
Dynamic Asset Allocation			
Sector Rotation			
Just-the-Basics			
Bond Upgrading			
Features			
SMI Advisory Management			
Asset Protection Guarantee			
Risk Management			

	CLASSIC $2,500 MINIMUM INVESTMENT *(Per Account)*	SELECT $250,000 MINIMUM INVESTMENT *(Per Household)*	PREMIER $1,000,000 MINIMUM INVESTMENT *(Per Household)*
Customized Portfolio			
Intelligent Rebalancing			
Integrated Financial Dashboard			
Tax-Loss Harvesting			
Asset Location			
Complimentary Planning Tool			
Assistance with Planning Tool			
Access to Stewardship Advisors			
Live Phone Support			
Mobile App			
Cost			
Free Trades			
Transfer Fees Rebated			
Management Cost	1.00%	0.95%	0.85%
	LEARN MORE	LEARN MORE	LEARN MORE

MEET THE TEAM

SMI Private Client customers have access to the same financial professionals who have been helping SMI customers and shareholders of their funds for years.

MARK BILLER

Senior Portfolio Manager

ANTHONY AYERS

Portfolio Manager

CFA

FRED BEERWART

Chief Compliance Officer

ERIC

COLLIER

Portfolio Manager

CFA

SANDRA MORRISON

Stewardship Advisor

AAMS®

BRYCE FATHAUER

Stewardship Advisor

CPA, AAMS®

PAUL WILKIN

Stewardship Advisor

CFA, CFP, CAIA

HOLLY WARD

Client Services Coordinator

DENISE LUCAS

Technology Services Coordinator

VICKI PERKINS

Client Services Assistant

SMI PRIVATE CLIENT WILL HELP YOU

REALIZE YOUR INVESTMENT GOALS

LET'S GET STARTED

CONTACT

If you have any questions or would like to speak to someone about SMI Private Client, please reach out to us either by phone or email.

800-796-4975

Help@SMIPrivateClient.com