

**Financial Planning, Tax Optimization and Investment Services**  
Smith & Co., LLP's Wealth Management Solutions is a financial planning, tax optimization and investment services company. We consolidate all our clients' financial support services creating greater efficiencies and higher returns than most fragmented, outsourced services. Our trusted, experienced and concierge-level team is committed to satisfying a family's wealth management goals and objectives.

**SMITH & CO. LLP**  
WEALTH MANAGEMENT SOLUTIONS  
FINANCIAL PLANNING, TAX OPTIMIZATION AND INVESTMENT SERVICES

Smith & Co., LLP  
27657 Old 41 Road  
Bonita Springs, FL, 34135



**SMITH & CO. LLP**  
**WEALTH MANAGEMENT SOLUTIONS**  
FINANCIAL PLANNING, TAX OPTIMIZATION AND INVESTMENT SERVICES

**MAXIMIZE  
RETURNS**

**MINIMIZE  
TAXES**

**MITIGATE  
RISK**



Call Us at 239.992.4232 or Visit us at [www.smithcompany-cpa.com](http://www.smithcompany-cpa.com)  
Today to Schedule Your Personal Wealth Management Review

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### Exclusive

Smith & Co., LLP's Wealth Management Solutions (WMS) is a limited practice. We serve a select number of families in Naples and Bonita Springs supporting all of their wealth management needs. This allows us to provide concierge-level service and personalized attention.

### Comprehensive

Our attention to design, implementation and ongoing oversight of your family's total wealth management plan assures optimized results.

### Non-Commission, Fee-Based

We are a non-commission, fee-based service. Our compensation is dependent on the stability and growth of your assets; therefore, we are partners in your financial success. We want your money to grow as much as you do.

### Customized

WMS works with each client individually to develop a wealth management and distribution Plan around the family's short and long-term cash-flow needs. The Plan establishes cash flow parameters, investment return benchmarks and risk management objectives—with applied discipline.

### Benefits

Our full-service, personalized Wealth Management Solutions result in:

**Maximized Returns:** Smith & Co., LLP's WMS provides structured investing, not speculation. Large scale diversification, cost-effectiveness and proper asset class allocation are used to capture market returns. Our exclusive access to institutional money managers delivers a significant advantage to Smith & Co., LLP clients.

**Minimized Taxes:** Tax implications are integrated in every financial decision. Our deep understanding and knowledge of tax law provides another significant advantage to clients. Planning for taxes now, and in the future, is an essential component of a family's ongoing total wealth management strategy.

**Mitigated Risks:** The element of Risk has many forms. It exists in all financial and non-financial decisions. Our objective is to assist you in neutralizing those risks that present a threat to the family estate.

### Design

- Personal Financial Plan
- Cash Distribution Budgeting and Forecast
- Estate Planning
- Tax Mitigation Strategies
- Portfolio Allocation
- Risk Management

### Implementation

- Institutional Investment Management
- Estate Document Coordination and Consultation
- Coordination of Asset Titling and Beneficiary Designations
- Alternative Investment Strategies including Self-Directed IRA's
- Real Estate and Private Business Interests

### Oversight

- Proactively Identify, Monitor and Adjust to Changes in Financial Condition and Family Dynamics
- Monitor and Rebalancing of Investments
- Assess current income tax obligations
- Monitor tax planning opportunities
- Conduct routine reviews



Brad Smith, CPA, ABV, CVA, IAR



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