



Mitchell K. Smith

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Since 1994, Mr. Smith has aided advisors, consumers and corporations in growing their businesses and personal plans through his unique consulting techniques. Recognized as an expert in a variety of areas in the financial services industry, he has turned consulting into an art form, and has worked with firms that include some of the largest private equity, consulting, accounting, legal and insurance on everything from advanced case modeling and product design to marketing, business planning and ethics.

During his early career he built an advisory business with over \$600MM in assets and later sold to his former partner to focus on the insurance consulting business. As a successful advisor, in both the securities and insurance business, he is well suited to assist other professionals in understanding how to bridge insurance and the money management business. In addition, he has successfully trained or worked with 1000's of professionals over 20 years to achieve success in the insurance and planning industries.

Working with some of the nation's leading Insurance, securities, executive benefit, RIA's, Law Firms, CPA's, and Private Equity firms in the country, he is seen as a specialist, garnering respect as a "go to" for estate planning, corporate design, insurance strategy and specialty insurance programs in this complex field. As a nationally recognized professional speaker, he has spoken on a multitude of subjects in both the insurance and Investment fields including economics, wealth preservation, business planning and the psychology of the investor. He has been a frequent contributor to many national media outlets such as NBC, Business Week, Investment News and Benefits Selling.

Mitchell has aided advisors and consumers in better understanding the economy, the complications of money, insurance designs and other financial issues. Creativity and implementation is a definitive strength which has allowed him to develop many programs and successful businesses. His corporate client list over time has included companies from the Fortune 500, associations and other major organizations across industries.

Sought after as the advisor's advisor, Mitchell Smith is the financial, insurance and corporate consulting industries' "Renaissance Man".