

Meet

# Ian Smith



## Specializations:

- Investment Portfolio and 401(k) Advice & Monitoring
- Retirement Planning
- Tax Planning
- College Planning
- Estate Planning
- Social Security
- Medicare
- Insurance & Risk Management

## Qualifications:

- BA in International Relations from Brown University
- MBA with concentration in Finance from University of Texas at Dallas

## Ian Smith, MBA

Ian is committed to helping individuals and families feel confident about their financial well-being. Taking a holistic approach, he educates and guides clients on all of life's financial decisions involving investments, retirement, taxes, insurance, estate planning and more. His ultimate objective is to help people achieve their financial goals and retirement dreams.

Bringing several years of experience in the financial services industry, Ian worked as a wholesaler for various investment fund sponsors prior to joining Advance Capital. He served as the Regional Vice President for Westwood Management.

Ian earned a Bachelor of Arts degree in international relations from Brown University, and his Masters of Business Administration with a concentration in Finance from the University of Texas at Dallas. He is a member of the Dallas/Fort Worth World Affairs Council.

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# Ian Smith (continued)

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## Were there any particular learning experiences that prepared you for this role?

Yes. My time as an adviser consultant and investment wholesaler helped me understand both the financial markets and the challenges clients face today. I learned that not every financial practice is the same. Many people unfortunately are taken advantage of given the complexities in this industry. There is a genuine need for trustworthy financial advisers.

## What influenced your decision to join ACM?

In my previous role, I worked with hundreds of investment advisers all over the country. I witnessed firsthand what separated the good advisory businesses from the bad ones. Most often, the good ones followed a simple formula, putting the client first and being able to offer clients value. Advance Capital checked off these boxes for me, as well as offered an opportunity to expand in my home market of Dallas, Texas.

## How would you describe ACM's culture?

I would describe Advance Capital's culture as one that puts the client first at all times. It is a firm you can trust and rely on. The firm has been around for over 30 years and continues to have a culture rooted in accountability and doing what's right for the client.

## What do you find most rewarding about your work?

As a financial adviser, the most rewarding aspect is seeing the difference you make in people's lives. Whether it is helping them reach their financial goals or lessening the burden they feel when trying to navigate their finances, seeing the impact you have made is very gratifying.

## What does it take to be successful in your role?

There are many traits required to be a successful adviser. However, to me, the most important quality for success as a financial adviser is authenticity. One must genuinely want to help people and enjoy doing it.

Investment advisory services are provided by Advance Capital Management, Inc.

Investments are not insured, and may lose money. Client should be prepared to bear the risks associated with investing.

## Fun Fact!

Ian personally knows what it takes to work hard with others to achieve big goals. He played Division I soccer at Brown University, where the team ranked in the top 25 for three consecutive years and reached the Sweet Sixteen during his senior year.