

# Jim Smith

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## PROFESSIONAL PROFILE

Jim Smith, Vice President and Wealth Management Advisor, joined Merrill Lynch in 1986. Along with a team of specialists, he focuses on the creation of strategies and solutions for clients that are designed to help them meet their short and long-term financial goals, including retirement and estate planning services. His approach to wealth management is consultative, objective and committed to excellence. He prides himself on his ability to listen to and interpret clients' ideas about their financial situations, preferences and goals and he uses the vast resources of Merrill Lynch to help them explore a wide range of possible solutions.

Jim has a Bachelor of Business Administration from the University of Mississippi. He also possesses the Certified Financial Manager designation, which is an internal Merrill Lynch self-study curriculum based on a variety of wealth management topics and a course exam. As a Portfolio Manager in the Merrill Lynch Personal Investment Advisory® (PIA) Program, Jim can manage customized investment strategies and implement proprietary model portfolios, as well as provide traditional advice and guidance.

In his spare time, Jim serves as Commissioner for District 3, Madison County MS Planning and Zoning Board and is President of the 500 member Dinsmor Homeowners Association. For more than 20 years, he has also trained in the art of Taekwondo and has achieved the rank of 3rd degree black belt.

Jim is a native of Jackson and lives in the Dinsmor community in Ridgeland with his wife Kerri and two children, Maggie and James. He and his family attend Broadmoor Baptist Church.

**Jim Smith, CFM**

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