



## Kevin J. Smith Financial Consulting Dates

Gettysburg College is pleased to announce additional dates for its **on-site financial advisory service** with Gettysburg alumnus **Kevin J. Smith**, '89. Named one of "America's Best Financial Planners" by Consumers' Research Council of America, Kevin is a recognized expert in the practice of wealth management and comprehensive financial and investment planning. He is Executive Vice President/Wealth Management with Janney Montgomery Scott LLC, a full service financial services firm that is a member of NYSE, SIPC and FINRA. Kevin has also attained numerous professional designations that represent the pinnacle of the financial planning and investment professions, including Chartered Financial Analyst (CFA®), CERTIFIED FINANCIAL PLANNER™ Practitioner (CFP®), Chartered Financial Consultant (ChFC®), Chartered Life Underwriter (CLU®), Chartered Advisor in Philanthropy (CAP®), Chartered Advisor for Senior Living (CASL®), Chartered Retirement Planning Counselor (CRPC®), Certification in Long-Term Care (CLTC®), National Social Security Advisor (NSSA®), Retirement Income Certified Professional (RICP®), Accredited Wealth Management Advisor (AWMA®) and Accredited Asset Management Specialist (AAMS®). For additional information on Kevin's wealth advisory practice, please refer to his website at [www.smithmayerliddle.com](http://www.smithmayerliddle.com). Employees, spouses and retirees are encouraged to take advantage of this special complimentary service!

Do you have financial questions such as:

- **Can I afford to retire early or at all? What is my "Retirement Readiness?"**
- **Are my current investments allocated properly?**
- **What Social Security benefits am I eligible for and when should I apply?**
- **What are the tax implications of my retirement distribution options?**
- **Am I on track to achieve my financial goals?**
- **What should I know about TIAA-CREF?**
- **What's the most tax efficient way to support my philanthropic causes?**
- **What's the difference between a Traditional and Roth IRA? Is a Roth conversion advantageous?**
- **What are the consequences to my family if I should ever require extended care?**
- **Am I vulnerable to estate taxes, and how can I minimize them?**
- **Is my life insurance coverage adequate?**
- **What's a "rollover" and should I consider one?**
- **[Your question here]?**

Appointments are available from 9:00 a.m. until 5:00 p.m. in CUB 251 on the following dates:

**October 12 & 26**

**November 9 & 30**

**December 14 & 21**

To take advantage of this special service, only two steps are required:

1. Call **(717) 779-2720** and ask for Kevin's assistant, Alyssum Keefer, to schedule your appointment.
2. Bring your financial information with you as it relates to the issue(s) you want discussed.

That's all there is to it! Call today to reserve your appointment!



## KEVIN J. SMITH

CFA®, CFP®, ChFC®, CLU®, CAP®, CASL®, CRPC®, CLTC®, RICP®, NSSA®, AWMA®, AAMS®  
Executive Vice President/Wealth Management

### Smith, Mayer & Liddle

a wealth advisory group

*"a wealth of knowledge about wealth"®*

Janney Montgomery Scott LLC

2315 N. Susquehanna Trail, Suite A, York, PA 17404

kevinsmith@janney.com | 717.779.2763 | www.smithmayerliddle.com

### Education

B.A. Management/Economics. Gettysburg College, 1989. Summa Cum Laude, Phi Beta Kappa, Class Salutatorian

### Advanced Degrees

Graduate of numerous executive education programs at the Kellogg Graduate School of Management, Chicago, IL, the Wharton School of Business of the University of Pennsylvania, and the University of Michigan School Of Business.

### Professional Designations

Chartered Financial Analyst (CFA®), CERTIFIED FINANCIAL PLANNER™ (CFP®), Chartered Financial Consultant (ChFC®), Chartered Life Underwriter (CLU®), Chartered Advisor in Philanthropy (CAP®), Chartered Advisor for Senior Living (CASL®), Chartered Retirement Planning Counselor (CRPC®), Certification in Long-Term Care (CLTC®), National Social Security Advisor (NSSA®), Retirement Income Certified Professional (RICP®), Accredited Wealth Management Advisor (AWMA®), and Accredited Asset Management Specialist (AAMS®)

### Background and Experience

Kevin's career in the areas of finance, accounting, and comprehensive financial and investment planning spans nearly 30 years. His unique business background and broad financial expertise have benefited an extensive list of individual and institutional clients in that time. Before joining Janney Montgomery Scott, he had previously served in similar positions with Legg Mason and Smith Barney. Prior to founding his wealth advisory practice in 2001, he was Divisional Controller and Director of Business Support for Glatfelter (NYSE:GLT), a global supplier of specialized papers headquartered in York, PA. In addition to the construction and design of investment portfolios and the implementation of prudent investment strategies, Kevin's vast expertise includes planning for education and retirement, philanthropic and estate planning, and the development of solutions and strategies for the complex needs of corporate executives, business owners, and affluent individuals and their families. He has become a recognized expert in retirement income planning with specialized knowledge of Social Security benefits, retirement income taxation, optimal distribution planning, and broad knowledge of numerous retirement systems such as TIAA-CREF, PSERS, MSRPS, FERS, and CSRS. He has attained numerous professional designations that represent the pinnacle of the financial planning and investment professions, and his insights have been featured in national publications such as U.S. News & World Report, Forbes, Investopedia, TheStreet, MSN and YahooFinance. Consumers' Research Council of America has named him one of "America's Best Financial Planners." A lifelong resident of York County, PA, he has formerly served as a council member of the Borough of Stewartstown and as Vice President of the York County SPCA board. He is actively involved in the Stewartstown Lions Club, FamilyFirst Health, Leave a Legacy York County, South Eastern Community Education Foundation, Dollars for Scholars, and several other civic organizations. He is an active supporter of Gettysburg College, his college alma mater, where he provides financial consulting services and serves in numerous volunteer capacities.

### Personal Mission Statement

"My continual endeavor is to make a positive difference in the lives of my clients and subsequent generations through trusted financial guidance and advice. I will earn the trust and respect of each of my clients through a genuine and sincere approach to understanding their unique individual needs, while addressing them with unquestionable competence and integrity. As a steward of my clients' wealth, I hope to be known not only for the breadth, depth, and quality of my expertise but also for the highly professional and reliable manner in which it is delivered. I believe that my advice matters, and that it can be used to meaningfully improve the lives of my clients, their families, and for the betterment of my community and the world at large."

SMITH, MAYER & LIDDLE  
A WEALTH ADVISORY GROUP  
*a wealth of knowledge about wealth®*

Janney  
Trusted Advisors for Generations