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Unique approach available for good financial planning

by Sam Bick

The Dallas firm of Smith, Frank and Partners, LLC, have a unique approach to financial planning. With both their "Advisory Board" concept and "Specialist" concept, Smith and Frank is a full service, personal and corporate, financial planning firm. Smith and Frank assists their clients with fee based financial planning, asset protection alternatives, tax deferral, estate preservation/charitable planning, business ownership succession, income replacement coverage, wealth accumulation planning, children's education planning, pension maximization, qualified and non-qualified planing, and provides retirement planning seminars for executives of large corporations. "Our clients do not come to us to get smarter, they're already smart," said Randall Smith, managing partner of Smith, Frank and Partners. "They come to us because they want their financial lives changed."

Their "Advisory Board" concept helps clients organize and implement all of their planning needs, by bringing professionals together. The firm's role as project manager in implementing this process is to assist the client in bringing their advisors together and/or make the necessary introductions to fill out a full "Advisory Board." Setting the date, agenda, and scheduling the advisors for the meetings are the responsibilities of Smith and Frank. "The concept is simple and based upon Napoleon Hill's "Brain Trust" concept," said Chris Fay, Partner, Smith Frank and Partners LLC. "The client should save time and by bringing the advisors together receive exponentially better ideas."

This full service firm strives for long term relationships with their clients. Smith and Frank's clients work with certified financial planners during the planning process as financial architects. Smith and Frank believes that planning is only half the battle, implementation of the financial plan is required for the client to

from the University of Texas. Disability Income Masters (Massachusetts Mutual Life Insurance Company), and NASD Series 6 Registration (mutual funds and variable products). Tamela Harwell, Senior Benefits Specialist, with iBenefitLine.com a subsidiary of Smith and Frank Group Services. She has a BS in business administration from the University of Texas at Dallas, with continuing education courses (30 hours yearly), and she is an active health insurance lobbyist.

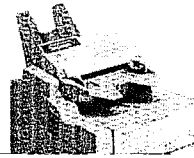
Among the three partners, Randall Smith, managing partner, Frank Voigt, and Chris Fay, they have over 70 years of financial experience.

Smith and Frank has a reputation for consistently upgrading its technology in computer systems, software and education in order to provide the client with leading edge planning technology. The firm maintains strong relationships with other professionals, such as accountants and lawyers, to offer a fully encompassing package.

In an effort to provide their markets with information and recognition Smith and Frank sponsors many events such as, Entrepreneur of the Year Program with Ernst and Young, The President's Forum for the Entrepreneurial Institute, Dallas 100, the Forum for Women Entrepreneurs, and The Celebration of Enterprise with Inside Collin County Business. For more information about Smith, Frank and Partners LLC, call 972-490-4377.

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not have the time to organize their financial planning.

Clients work with "Specialists" at the point of implementation. This concept follows the thought process that you would not see a General Practitioner for heart treatment, instead you would seek the skills of a Cardiologist. The diverse and expanding markets leads Smith and Frank to utilize specialists to help their clients. "There are so many innovative & new products in each product spectrum," said Randall Smith, "it requires a specialist to provide the alternatives, definitions, creativity, and pricing to be properly implemented."

Smith and Frank's "specialists" include: Frank Voigt, Partner, Investment Specialist, has 17 years experience, BBA in finance from Georgia Southern University, Chartered

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