



“We help our clients save for and protect the things they care about.”

James E. Smith, Jr.

Vice President

Community & Industry Involvement:

- President-Elect, NAIFA–Memphis
- Advisory Council Member, Alzheimer’s Association–Memphis Chapter
- Guest Instructor, Economic Opportunities

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Jim and Todd apply a team approach in helping their clients identify and achieve the goals that are important to them. They have a commitment to developing lifelong relationships with their clients, and together they develop personalized strategies that will protect both wealth and lifestyle. Utilizing a unique four-step process, they help their clients implement a course of action toward their financial goals.

Jim is an alumnus of the University of Mississippi and has also completed coursework from the College for Financial Planning. He lives in Collierville and has three sons, Jack, Sam, and Ben.

Todd received his undergraduate degree from Oglethorpe University and his MBA from the Georgia Institute of Technology. He lives in Germantown with his wife, Virginia, and their two children, Jacob and Amalia.

Well-known educators in the Mid-South and trusted resources on financial matters, Jim and Todd have conducted seminars on topics including long-term care insurance, retirement, and estate transfer strategies. Media appearances include the Germantown Television program *Mentors* and the *Drake & Zeke Show* on WXXM, 98.1 FM.

Todd E. Shapiro

Financial Representative

Community & Industry Involvement:

- Committee Member, Habitat for Humanity
- Ambassador, Greater Memphis Chamber
- Member, NAIFA–Memphis

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