



C. Stephen Smith

CLU, CLTC
Vice President,
Wealth Preservation

Honors & Distinctions:

- Member, John Hancock Hall of Fame
- Life and Qualifying Member, Million Dollar Round Table
- Member, Society of Financial Services Professionals
- Member, Nashville Association of Insurance and Financial Advisors
- Member, Nashville Estate Planning Council
- Past Board Member, Nashville Chapter Society of Financial Services Professionals
- Past Board Member, Nashville Association of Insurance and Financial Advisors

“Yesterday is ‘history.’ Tomorrow is a ‘mystery.’ Today, however, is a ‘gift,’ which is why we call it the ‘present.’ The man who uses that gift wisely is one who has a solid opportunity to see his financial dreams fulfilled.”

A native Nashvillian, Steve Smith began his career in the financial services industry with John Hancock in 1975. He was inducted into John Hancock’s Hall of Fame in April 2008, a prestigious distinction in which only 183 members have been inducted since 1964.

A graduate of Belmont University, Steve also holds a Master of Music degree in vocal performance from Peabody College. In 1974, he was a guest soloist with the Nashville Symphony Orchestra at the Italian Street Fair. In 1983, Steve received the CLU (Chartered Life Underwriter) designation from The American College in Bryn Mawr, Pennsylvania, and in 2008 earned his CLTC (Certified in Long-Term Care).

As a result of his education and experience, Steve serves Innovative Financial Group as Vice President, Wealth Preservation. He has conducted numerous seminars and workshops on Estate Preservation, Business Succession Strategies, and Retirement Funding.

As tax laws and the economic environment are constantly changing, Steve works to help clients maintain a long-range focus by offering financial products that are relevant to their individual circumstances today—but that also offer flexibility to meet these changing needs in the future. Often this involves working with a client’s attorney or CPA to help make sure that goals are properly addressed and that appropriate products are implemented.

Steve and his wife, Kathy, reside in the Horseshoe Bend Community. They are the proud parents of Stephanie Weathers of Dallas, Texas, and Chelsea Childress of Nashville, as well as the doting grandparents of Reed and Lauren Weathers. They are also members of the West Franklin Baptist Church, where Steve is the Music and Worship Pastor and teaches an adult Bible study group.

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