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M.J. Smith & Associates Launches wealthpath™

– Service Combines Digital Index Investing with Guidance from Experienced Financial Advisors –

GREENWOOD VILLAGE, CO – October 18, 2017 – M.J. Smith & Associates, a nationally recognized independent financial advisory firm, announced the launch of **wealthpath™**, a new service that combines the convenience and cost-efficiency of online investing with the comfort of having access to an experienced financial advisor who can answer questions or provide guidance. The firm developed this hybrid approach to financial advice for both entry-level investors who are rapidly accumulating wealth, and seasoned investors seeking a low-cost investment platform with occasional access to an investment professional. All **wealthpath** clients must make an initial investment of at least \$100,000.

“The **wealthpath** model is a relatively inexpensive alternative to the holistic, concierge-level service we offer our high net-worth clients,” said Mark Smith, CFP®, CPA/PFS, CIMA®, president of M.J. Smith & Associates. “This service not only provides investors with the ability to set up and manage their investments in one of our model portfolios; it also proves them with the ability to contact an advisor by telephone on a limited basis. We believe it’s perfect for people with less complex financial situations, or for those who don’t wish to develop a comprehensive financial plan,” he said.

With advisory fees starting at .70 percent for the first \$1 million invested, and the low-cost advantages of index investing, the overall cost structure of **wealthpath** tends to be significantly less than that offered by traditional bank, brokerage firm or insurance company

platforms, Smith added. The firm developed **wealthpath** using technology from Raymond James, an S&P 500 global financial services firm that serves as custodian for clients of M.J. Smith & Associates. Clients will have access to many secure features within **wealthpath**, such as bill-pay services, check writing, debit cards, e-signatures, mobile check deposits and securities-based loans.

More information about **wealthpath** is available at www.startmywealthpath.com.

About M.J. Smith and Associates

With offices in Greenwood Village, Colo., M.J. Smith and Associates, a Registered Investment Advisor, offers an extensive array of financial services, including investment planning, retirement planning, estate planning and tax planning, as well as insurance and risk management. Founded in 1983 by Mark J. Smith, the firm is registered with the U.S. Securities and Exchange Commission. M.J. Smith and Associates offers securities through Raymond James Financial Services Inc., Member FINRA/SIPC. For more information, visit <http://www.mj-smith.com/>.

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