

Tom Jacobsen, MBA

Chief Operating Office and Operations Manager, RJFS



Joined M.J. Smith & Associates in 2007

Tom has more than 25 years of operations and management experience in financial services. A graduate of the University of Colorado, Tom earned a bachelor's degree in Economics from CU Boulder and an MBA from CU Denver. Tom focuses on strategic planning and development while ensuring that the firm is in full compliance with industry rules and regulations.

WHAT DO YOU LIKE ABOUT BEING ON THE OPERATIONS SIDE OF THE BUSINESS?

Earning my MBA gave me a better understanding of how a business runs and that fascinated me. I like that there's a strategic side of operations as well. The long-term planning and problem-solving aspect of operations are challenges I enjoy.

WHAT DRIVES YOU PROFESSIONALLY?

First, it's the work environment and firm activities. This firm is like a family. Our office allows us to interact on a deep level and really be there for each other. It creates an environment where you look forward to seeing people and learn what's going on with them. Having previously worked at a larger firm, I felt it was like trying to turn an oil tanker. Here, we can be nimble, execute quickly, and make an impact.

The second driver is what we do every day. It's rare to genuinely impact people's lives in a positive way. I've watched people wonder if they could ever retire, and then I've had the honor of attending their retirement party. It's emotional and exciting to be on this journey with them and see it come to fruition. When you have multi-generational clients, you know you're doing something right as a firm.

We are so consistent with our processes here. The technology has changed and allowed us to become more efficient, but all clients, regardless of the size of the relationship, receive the same consistent message. Everything we do is in the best interest of our clients.

If we ran into you on the weekend, we'd find you...

At a Broncos game with my wife, Patty, and our daughter, Katherine, who is attending CU Boulder. We love to travel and have a cabin in Minnesota where we go during the summer.

Fun Facts:

I'm a native Coloradan and a huge Broncos fan. Our family has had Broncos season tickets since 1965. I'm also president of the Denver Broncos Quarterback Club.

CREDENTIALS

B.S. in Economics,
University of Colorado

M.B.A., University of Colorado

General Securities
Representative (Series 7)

General Securities Principal
(Series 24)

Uniform Securities Agent State
Law Examination (Series 63)

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