



K.C. Smith, CFP®, CEPA

Managing Associate

K.C. Smith, CFP®, CEPA, is a Managing Associate at Henssler Financial. Mr. Smith's responsibilities include managing client accounts on a day-to-day basis, analyzing client data and providing recommendations based on the firm's strict investment criteria. As a Managing Associate, Mr. Smith engages in initiating new business and works on overarching planning issues, in addition to managing staff and leading teams. He also contributes to "Money Talks," the firm's financial talk radio show.

After joining Henssler Financial as an intern, Mr. Smith accepted a full-time position in the Operations Department as an Assistant in 2008, assisting with trading and internal accounting. A year later, Mr. Smith transitioned into an Assistant position in the Planning & Implementation Department. He was promoted to Account Executive in 2011 where he maintained client files and updated financial plans. He was promoted to Associate in 2012 and became a Senior Associate in 2013. In 2016, he was promoted to Managing Associate.

Mr. Smith was named to the 2023 Atlanta Five Star Wealth Managers list that was published in the October 2023 issue of Atlanta magazine. The Five Star award goes to wealth managers who satisfy 10 objective eligibility and evaluation criteria that are associated with wealth managers who provide quality services to their clients.

Having earned the Certified Exit Planning Advisor (CEPA) designation from the Exit Planning Institute, Mr. Smith is part of an elite group of business advisers who are trained in aiding clients grow, preserve, and transfer business wealth by helping owners and their families successfully plan and execute ownership transition.

Mr. Smith graduated from The Coles College of Business at Kennesaw State University with a Bachelor of Business Administration in Finance. He earned his Master of Business Administration in Finance and Master of Business Administration in Personal Financial Planning from the J. Mack Robinson College of Business at Georgia State University. Mr. Smith is a CERTIFIED FINANCIAL PLANNER™ Certificiant.

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The 2023 Five Star Wealth Managers list published in the October 2023 issue of Atlanta Magazine. For more information on the Five Star award and the research/selection methodology, go to http://fivestarpromotional.com/ref/research/WM_ResearchMethodology.pdf. Contact Five Star Professional at info@fivestarpromotional.com for additional information regarding the selection process. The Five Star award is not indicative of a wealth manager's future performance, nor is there any guarantee that the selected professionals will be awarded this accomplishment by Five Star Professional in the future.

Henssler Financial is a financial planning and money management firm with assets under advisement of more than \$3 billion as of December 31, 2023. Henssler Financial, which includes federally registered investment adviser G.W. Henssler & Associates, Ltd. and is headquartered in Kennesaw, Georgia, a suburb of Atlanta.



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**2023 Atlanta Five Star
Wealth Manager**

Contact Info:

ksmith@henssler.com
main: (770) 429-9166
direct: (678) 797-3759

