

HARRIS myCFO®

Determination and persistence are two hallmarks of Adam Smith's work philosophy. He applies both, as well as a keen analytical focus, in developing tactical solutions for a broad variety of portfolio management issues. Adam's inherent curiosity about markets keeps him ahead of the curve in developing the latest, most efficient investment strategies for his clients. Adam began working in financial services in 2007 and joined Harris myCFO Investment Advisory Services, LLC in 2009.

Adam is a graduate of Lehigh University, Bethlehem, PA, where he earned a BS in Finance. He earned the Chartered Financial Analyst® designation in 2011 and is currently working toward completion of his CAIA certification requirements.

Adam is a resident of Chicago and an ardent Blackhawks fan. He enjoys playing ice hockey, and played for four years on his college team. Adam also spends time skiing in Colorado and is always looking for opportunities to explore new downhill destinations.



ADAM D. SMITH, CFA
Client Service Manager,
Harris myCFO Investment
Advisory Services, LLC

Tel: 312.461.6193
adamd.smith@harrismycfo.com

Harris myCFO
111 West Monroe Street, Suite 10E
Chicago, IL 60603

Harris myCFO® | A Knowledge of Wealth™

Integrated wealth management with independent investment advisory services and the comprehensive capabilities of a multi-family office.

- INVESTMENT ADVISORY
- ESTATE AND TRUST ADVISORY
- TAX PLANNING
- PHILANTHROPIC PLANNING
- FAMILY EDUCATION
- CAPITAL ADVISORY SERVICES AND CUSTOM BANKING
- RISK MANAGEMENT AND INSURANCE ADVISORY
- FINANCIAL REPORTING AND EXPENSE MANAGEMENT

