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**Jonathan Smith & Co.**  
INVESTMENT COUNSEL

## For Immediate Release

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### **Investment Associate Justin Smith passes CFA Level III Exam**

GREENSBORO — The CFA Institute announced that candidate Justin Smith has passed the CFA Level III Exam. The CFA Program is a self-study, graduate-level program for investment professionals. Justin Smith is an investment associate at Jonathan Smith & Co., Investment Counsel, LLC, a 20 year old wealth management and investment advisory firm in Greensboro, NC.

“I can’t say enough about the CFA Program,” said Mr. Smith. “The process alone of committing to a program of its intensity has prepared me to take care of our clients in a way I never expected.”



Justin notes that the scope of the curriculum really sets it apart, “The program’s focus on ethics, behavioral finance and relevant knowledge has made it much more meaningful to me than just a way to put three more letters on my business card.”

After graduating magna cum laude as one of eight University Scholars from North Carolina State University’s College of Management in 2003, Justin went to work for First Citizens Bank and Trust Company as a Trust Accountant. After two years, he moved to Greensboro to work as an Investment Associate at Jonathan Smith & Co. Justin has been able to apply his knowledge from the CFA Program directly to his work, specifically in the areas of client care, investment research and portfolio management for the past three years.

The CFA Program, now in its fifth decade, was first proposed by Benjamin Graham in 1942 as a member of the New York Society of Securities Analysts. The *Economist* calls the CFA Program “the gold standard” among investment analysis designations and employers around the world recognize the value of the charter. The curriculum is rigorous; pass rates typically range from 40-50% each year, with each annual exam demanding a suggested 250 hours of study and, on average, 4 years to complete the program.

World-wide, more than 80,000 charterholders take part in a highly active professional membership organization. Its members play leading roles in investment companies, mutual funds, broker-dealer/investment banks, banks, consulting firms, insurance companies, pensions and foundations, and research and academic institutions.

#### **About Jonathan Smith & Co.**

Jonathan Smith & Co. is a practice of experienced investment professionals specializing in high net worth wealth management. Aware that each person’s wealth management needs are unique and often complex, they craft individualized solutions and simplify life’s financial aspects for their clients. Their mission is to build, protect and manage each client’s wealth through every stage of life.