

Casey Smith PRESIDENT, WISER WEALTH MANAGEMENT

20 RISING STARS UNDER 40

Disillusionment is nothing new. An idealistic college grad enters the world only to learn all is not as he expected. He either accepts the realities as they are or walks away. Casey Smith, in his own way, did both.

Smith grew up in a conservative family and attended the private college, Berry College, sheltered environments by his own admission, but his first job with a large brokerage firm provided a larger culture shock than he'd anticipated. He was doing more selling than advising and was surrounded, to his horror, by stock jockeys.

So he quit and spent eight months following his passion for aviation from the confines of training aircraft all the way to the hectic schedule of a junior pilot at a small airline. Eventually the airline was bought out and Casey, suddenly not so junior, had his pick of schedules.

With more time on his hands, he decided to return to finance. This time, however, he'd do it on his terms. In 2001, he founded Wisier Wealth Management Inc. where he teamed with a group of mavericks espousing a fee-only approach, steering clients not toward stocks but the emerging world of index funds. The Marietta-based business has done well.

"At the time we were ahead of the curve on this," he says. Eventually the world caught up. He has spoken at conferences worldwide and became his airline's 401k specialist, offering every pilot two free hours of financial consultation. His expertise on fiduciary-only stock management has also landed him interviews in news outlets including the *Wall Street Journal*, *Kiplinger Personal Finance Magazine*, *CNN Radio*, and the *Marietta Daily Journal*." — *By Kevin Hazzard*

the stats

Age: 33

Education: Bachelor's Degree, Berry College. Tax Training; Estate Planning Training; Pilot School.

Personal: Married to Angela. The couple has two children, Ethan, 5 and Katelyn, 3.

Role Model: "My grandfather Rev. Charles Sims — Always forgiving, always showing Christ-like love to everyone, never afraid of work."

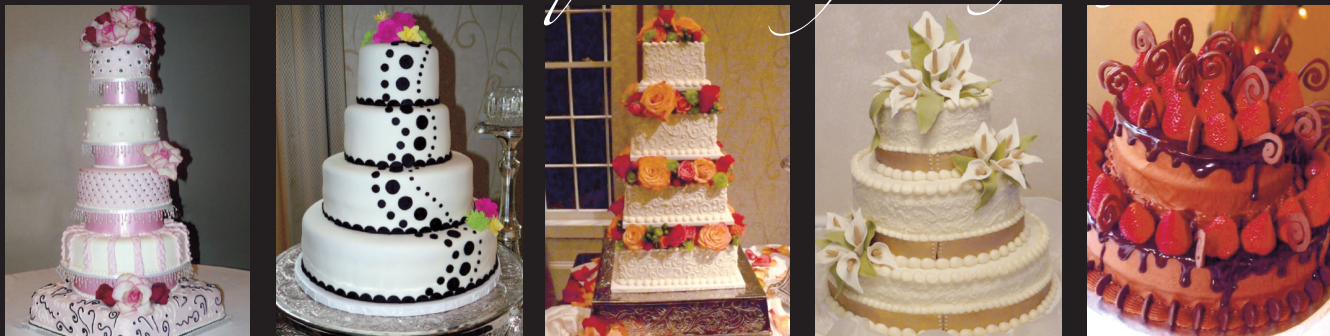
Favorite Quote: "Investing has always been, and will remain, an operation in which wealth is transferred from those without working knowledge of financial history to those who have one." — William Bernstein

Additional Activities/Volunteer work: Partner with Leading the Way with Dr. Michael Youssef www.leadingtheway.org. Board Member, Berry College Board of Visitors, Campbell School of Business Executive Advisory Council, Berry College Planned Giving Council Member, Berry College Student Run Enterprises Board Member.



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