



## ABOUT

Daniel believes that everyone deserves sound advice and exceptional service. He specializes in sales and relationship management skills and their integration with the knowledge complexities of estate planning, estate taxation, charitable giving, and investment management issues. Daniel also leads Cannon Trust School, the country's largest trust school. His consulting work includes computer-based learning solutions, private family wealth consultation, and expert witness services.

## INDUSTRY EXPERIENCE

First Hawaiian Bank  
Dean Witter Reynolds

## CONTACT

dsmith@cannonfinancial.com

# DANIEL SMITH

Executive Vice President, Subject Matter Expert



## CLIENT EXPERIENCE

Provided comprehensive consulting for initialization of a Trust product offering within a national brokerage firm

- Analysis of legal issues required for start up and sustainment of business unit
- Policy and procedure development to mitigate risk associated with product offer
- Designed, developed, and delivered on-boarding education strategy and sustainment programs

Provided comprehensive consulting for expanded Trust product offering within a national bank

- Analysis of legal issues required for start up and integration of new product
- Product consolidation and redesign of overall product offerings
- Policy and procedure development to mitigate risk associated with product offer
- Designed, developed, and delivered on-boarding education strategy and sustainment programs

Served as liaison to national brokerage firm in their acquisition and expansion of a trust firm

- Developed a scalable sales modeling platform
- Designed, developed, and delivered education strategy for independent investment representatives and RIAs

Performed trust audit services including analysis of work flows and risk exposures for community, regional, national and trust firms (both traditional and non-traditional platforms)



## EDUCATION & DESIGNATIONS

B.B.A. in Marketing and Finance – University of South Carolina

Oregon State University

Advising Clients on Estate Planning and Philanthropy – University of Hawaii Foundation

Financial and Estate Planning – Hawaii Institute

Gift and Estate Tax Committee, Probate Section – Hawaii Bar Association

Hawaii Estate Planning Council, Hawaii Tax Institute

CFP,<sup>®</sup> Series 7, Series 63