

FOR IMMEDIATE RELEASE

C.R. Smith Financial: Over Five Decades of Trusted Financial Service in the Niagara Region

St. Catharines, ON – March 6, 2025 – C.R. Smith Financial, a leading financial services firm specializing in comprehensive financial planning, investment management, and insurance solutions, is a pillar of the community providing over 50 years of dedicated service to the Niagara region. Since its establishment in 1974, the firm has built a legacy of trust, integrity, and personalized guidance, helping individuals, families, and businesses achieve financial security and peace of mind.

Founded by Chuck Smith, C.R. Smith Financial has grown into a cornerstone of the local financial community. Today, under the leadership of Doug Smith, a second-generation Elite Advisor with over 35 years of industry experience, the firm continues to uphold the core values that have defined its success for more than five decades.

"Reaching this milestone is a testament to the enduring trust our clients have placed in us and the strong relationships we've cultivated over the years," said Doug Smith. *"We are honoured to continue our tradition of providing sound financial guidance, adapting to the evolving financial landscape while remaining deeply committed to the people and businesses of Niagara."*

A Team Committed to Excellence and Community

C.R. Smith Financial's success is built upon a team of highly skilled professionals who bring decades of combined expertise in financial planning, wealth management, and insurance solutions. Advisors such as Jay Fast, Brandon Currie, Bill Tomlinson, Matt Milner, and Ken Corfield hold esteemed industry designations, ensuring clients receive expert guidance tailored to their unique financial goals.

Supporting them is a dedicated team, including Ashley Marquis, Garrett Spiering, Karen Rice, and Josh Race, who work closely with clients to provide a seamless and personalized experience. The firm's client-first approach ensures that individuals, families, and business owners receive comprehensive financial strategies designed for long-term success.

Beyond financial planning, C.R. Smith Financial is deeply rooted in the Niagara community, actively supporting charitable initiatives. One of its most significant contributions is the Wise Guys Charity Fund, co-founded by Chuck and Doug Smith in 1991. This 100% volunteer-run organization has raised and reinvested over \$5.42 million into the Niagara region, supporting a wide array of local projects and programs aimed at improving the quality of life for community members. Beneficiaries include women's shelters,

mentorship programs, advocacy centers, and numerous other organizations addressing critical community needs.

"At C.R. Smith Financial, we believe that true success is measured not only by financial growth but also by the positive impact we make in our community," added Smith. "Our team remains dedicated to making a difference—both in the lives of our clients and throughout the Niagara region."

Comprehensive Insurance and Financial Solutions

C.R. Smith Financial offers a full suite of insurance solutions designed to protect individuals, families, and businesses from financial uncertainty.

- Employee benefits and group insurance – Customized plans with health, dental, life, disability, and group retirement savings options to support employee well-being and retention.
- Life insurance – Term and permanent coverage to safeguard loved ones and provide financial security.
- Critical illness insurance – Lump-sum benefits to help cover medical costs, lost income, and unexpected expenses during a serious illness.
- Disability insurance – Income protection for individuals and business owners in case of illness or injury.
- Health and dental insurance – Standalone or employer-sponsored plans covering medical, prescription, and dental expenses.
- Estate and legacy planning – Strategies to preserve wealth and ensure a smooth asset transition for future generations.

By integrating insurance with investment planning, retirement strategies, and wealth management, C.R. Smith Financial delivers a holistic approach to financial security, ensuring clients have the right protection at every stage of life.

Looking Toward the Future

As C.R. Smith Financial moves forward, the firm remains committed to maintaining the highest standards of expertise, accessibility, and service in an increasingly complex financial world. The team actively pursues ongoing education, advanced certifications, and specialized training to stay ahead of industry trends, ensuring that clients receive the most current and strategic financial advice available.

With boundless information readily available online—at times conflicting or incomplete when related to finance—C.R. Smith Financial recognizes the importance of being a highly accessible and trusted resource. More than ever, clients need professionals who can help them interpret information accurately and make informed financial decisions with

confidence. The firm takes pride in its ability to offer not only expert guidance but also a level of personal connection and understanding that cannot be replaced by technology alone.

"We are incredibly grateful for the trust and support of our clients, partners, and the Niagara community," said Smith. "As we look to the future, we are committed to continuous learning, staying at the forefront of financial expertise, and ensuring that our clients always have access to the knowledge and guidance they need to secure their financial future."

About C.R. Smith Financial

Founded in 1974, C.R. Smith Financial is a trusted financial services firm serving the Niagara region and beyond. The firm specializes in financial planning, investment management, and insurance solutions, with a client-first approach that prioritizes trust, integrity, and personalized service. For more information, visit www.smithfinancial.ca.

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