

FOR IMMEDIATE RELEASE

C.R. Smith Financial Announces New Partners, Strengthening Long-Term Commitment to Niagara and Clients Across Canada

St. Catharines, ON – June 2, 2025 – C.R. Smith Financial, a pillar of trust and expertise in the Niagara region and serving clients nationally for over five decades, is proud to announce that Matt Milner, Jay Fast, and Brandon Currie will join Doug Smith as partners. This evolution in leadership underscores the firm's dedication to long-term planning, sustainability, and the continued delivery of trusted guidance for clients, families, and businesses not only in Niagara but across numerous provinces in Canada where the firm is licensed. For our valued clients, this transition reinforces our commitment to continuity; it's truly business as usual, with the same dedicated team continuing to serve your financial needs.

Founded in 1974 by Chuck Smith, C.R. Smith Financial has always believed that a well-crafted long-term plan is the cornerstone of lasting security. For over 50 years, the firm has grown alongside its clients, delivering peace of mind through comprehensive insurance and financial planning solutions rooted in integrity, knowledge, and personal connection.

“At C.R. Smith Financial, we know that careful succession planning is essential—not just for our clients, but for our own business,” said Doug Smith. “Welcoming Matt, Jay, and Brandon as partners is a natural next step in our commitment to sustainability and trusted service, ensuring that our clients, whether in Niagara or across Canada, continue to benefit from our experience and dedication for generations to come. It is especially exciting to welcome a third generation of our family, with Jay Fast joining as one of the new partners.”

With a combined 25 years of experience at C.R. Smith Financial, Matt, Jay, and Brandon have a wealth of knowledge and a shared dedication to the values that have defined the firm's reputation. Their expertise in insurance, retirement, group employee benefits, and legacy planning ensures clients receive guidance designed for long-term success, even as the financial landscape evolves.

“It's an honour to take the next step within our team and join Doug as a partner,” said Matt Milner. “I look forward to building on our strong foundation and helping clients achieve their goals with confidence, knowing we have a team committed to the future.”

The firm's approach remains holistic, integrating insurance, investment, and estate planning strategies to protect what matters most at every stage of life. Licensed to serve clients across multiple provinces, the team delivers tailored solutions that

address both local priorities and the broader needs of families and businesses nationwide. This enables C.R. Smith Financial to deliver continuity and specialized guidance for generational and family portfolios, ensuring clients receive personalized strategies wherever they reside.

“Our commitment goes beyond financial planning,” said Jay Fast. “We’re invested in the long-term well-being of every individual and business client we serve and, in our community, supporting initiatives and providing solutions that help our clients and communities thrive.”

Sustainability at C.R. Smith Financial means more than business continuity; it means giving back to the community. The firm’s leadership and staff are deeply involved in community initiatives, most notably the Wise Guys Charity Fund, which has reinvested over \$5.42 million into local projects since 1991.

“For me, becoming a partner is about embracing continuous learning and growth, both as an advisor and as part of a team dedicated to serving our clients wherever they are,” said Brandon Currie. “I look forward to building on our collective expertise, always striving to deliver thoughtful solutions and guidance that evolve with our clients’ needs.”

As C.R. Smith Financial looks ahead, the firm remains committed to ongoing learning, advanced training, and upholding the highest standards of accessibility and knowledge. Clients can continue to rely on the team’s trusted guidance and personal service, knowing their long-term interests are always at the forefront.

Proudly serving Niagara and beyond since 1974.

C.R. Smith Financial

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