



Sean Kirby-Smith, CRPS®

Vice President, Founding Member

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Sean Kirby-Smith is a Vice President and Financial Advisor at Seventy2 where he specializes in advising business owners and high net worth families on comprehensive estate planning strategies, business planning and retirement strategies. He earned the premier Chartered Retirement Plans Specialist® designation to help better serve his clients with retirement plan administration needs.

Sean began his career as a Financial Advisor during his four-year tenure at Morgan Stanley Wealth Management where he first teamed up with current Seventy2 Capital colleagues. While there, he worked on client acquisition and business development. He was named a Five Star Wealth Manager in 2021*. He holds a Bachelor of Science in Business Administration from the College of Charleston in Charleston, South Carolina. During his time at C of C, he was involved with YES Carolina, South Carolina's only organization focused on teaching youth the principles of entrepreneurship and free enterprise.

Currently, Sean volunteers with the Treatment and Learning Centers of Rockville, MD. TLC is a private, non-profit organization whose programs serve more than 2,000 individuals with a wide range of special needs. In his free time, Sean enjoys playing golf, running throughout Washington DC's Monuments and relaxing at the beach.

The Five Star Wealth Manager award, administered by Crescendo Business Services, LLC (dba Five Star Professional), is based on 10 objective criteria: 1. Credentialed as a registered investment adviser or a registered investment adviser representative; 2. Active as a credentialed professional in the financial services industry for a minimum of 5 years; 3. Favorable regulatory and complaint history review (unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through Five Star Professional's consumer complaint process); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients; 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. Wealth managers do not pay a fee to be considered or awarded. Once awarded, wealth managers may purchase additional profile ad space or promotional products. The award methodology does not evaluate the quality of services provided and is not indicative of the winner's future performance. For 2021, 2,091 Washington, D.C. - area wealth managers were considered for the award; 121 (6% of candidates) were named 2021 Five Star Wealth Managers.

To qualify as having favorable regulatory and complaint history, the person cannot have: 1. Been subject to a regulatory action that resulted in a suspended or revoked license, or payment of a fine, 2. Had more than three customer complaints filed against them (settled or pending) with any regulatory authority of Five Star Professional's consumer complaint process, 3. Individually contributed to a financial settlement of a customer complaint filed with a regulatory authority, 4. Filed for bankruptcy, or 5. Been convicted of a felony.