



## **Sean Kirby-Smith, CRPS®**

Vice President

*A 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 was issued on October 17, 2021 by Five Star Professional (FSP) for the time period January 4, 2021 through July 23, 2021. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. The award is based on 10 objective criteria. Eligibility criteria – required: 1. Credentialed as a registered investment adviser or a registered investment adviser representative; 2. Actively licensed as a registered investment adviser or as a principal of a registered investment adviser firm for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by FSP, the wealth manager has not; A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or FSP's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through FSP's consumer complaint process; feedback may not be representative of any one client's experience; C. Individually contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria – considered: 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. FSP does not evaluate quality of services provided to clients. The award is not indicative of the wealth manager's future performance. Wealth managers may or may not use discretion in their practice and therefore may not manage their clients' assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by FSP or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by FSP in the future. 2021 Washington D.C.-area wealth managers were considered for the award; 121 (6% of candidates) were named Five Star Wealth Managers. Visit [www.fivestarprofessional.com](http://www.fivestarprofessional.com).