



hooker & holcombe



Terrence M. Smith, Jr., CPC, QPA, QKA, CFA

Consultant, Practice Leader
Retirement Services

Experience

Terry Smith, Jr. is a consultant, practice leader for the firm's retirement services division. In this role he is responsible for direct oversight of the firm's defined contribution recordkeeping and TPA services, with a focus on quality of service and customer satisfaction. He works closely with clients, providing strategic insight that helps them to identify, achieve and exceed their retirement plan goals.

In the retirement industry for more than 20 years, Terry has extensive knowledge spanning all aspects of defined contribution plan design, implementation, investments and administration, with proficiency in qualified and non-qualified plans. Terry's broad expertise gives him the ability to evaluate each client from a unique perspective, ensuring a customized solution to meet each client's unique retirement needs.

Prior to joining H&H, Terry was with USI Consulting Group's Defined Contribution department where he served as assistant vice president and account manager. Previous positions held include managing director, defined contributions group for Fidelity Investments, implementation manager for Wachovia Bank and client manager for Charles Schwab Retirement Plan Services.

Education

Terry graduated from the University of Akron with a bachelor's degree in business administration. Terry has attained a number of industry designations including Certified Pension Consultant (CPC), Qualified Plan Administrator (QPA), Qualified 401(k) Administrator (QKA), and Chartered Financial Analyst (CFA).

Professional Affiliations

Terry is a member of the American Society of Pension Professionals and Actuaries and the CFA Society Hartford.