



Daniel A. Smith
Executive Vice President
Director of Personal Trust



About Daniel

Daniel's extensive real-world experience brings his classroom information into immediate, practical, applicable form. He specializes in integrating sales and relationship management with the complexities of estate planning, estate taxation, charitable giving, and investment management issues of the High Net Worth and Ultra High Net Worth client. Prior to joining Cannon in 1990, Daniel was a Trust Services Officer at First Hawaiian Bank and an Account Executive with Dean Witter Reynolds (now Morgan Stanley). His years of experience with Cannon have added best practices from constant interaction with many of the nation's top financial advisors and wealthy individuals.

When not teaching at Cannon Schools, Daniel is a frequent speaker at banks, trust companies, brokerage firms and other financial services companies nationwide. He also speaks at financial services conferences on estate planning, taxation, sales, sales management, quality service and industry trends. His work has been published in *Trusts & Estates*, *Registered Rep* and other industry publications. Daniel's in-house training addresses sales and service issues and technical topics related to personal trust, investments, and estate planning. His consulting work is focused on developing custom sales presentation materials and computer-based training.

Primary Areas of Expertise

- Sales and Relationship Management
- High Net Worth issues
- Ultra High Net Worth issues
- Estate Planning and Taxation
- Business Succession Planning
- Charitable Giving

Education

B.S. - Business Administration, Marketing (major) and Finance (minor), University of South Carolina
Oregon State University
Cannon Trust School, Honor Graduate

Daniel A. Smith - Executive Vice President

Designations & Licenses

Certified Wealth Strategist®
Certified Instructor/Facilitator
Certified Financial Planner®
NASD Series 7 General Securities Representative
NASD Series 63 Uniform Securities Agent
Life Insurance Agent

Professional Education

- Advanced Administration of Estates & Trusts
Cannon Financial Institute
- Advanced Estate Planning Techniques
ALI-ABA
- Advanced Instructor Techniques
Langevin Learning Services
- Advanced Personal Trust Update
Cannon Financial Institute
- Advising Clients on Estate Planning & Philanthropy
University of Hawaii Foundation
- Agent's License, Life & Health Insurance (expired)
- Cannon Trust School I, II, III
Cannon Financial Institute, Inc.
- Estate Planning and Probate in Hawaii
National Business Institute
- Financial and Estate Planning
Hawaii Institute for Continuing Legal Education
- Gift and Estate Tax Committee, Probate Section
Hawaii Bar Association
- Hawaii Estate Planning Council
Hawaii Tax Institute
Chaminade University of Honolulu
- How Adults Learn
Langevin Learning Services
- Instructional Design for Trainers
American Management Association
- Instructional Techniques for Trainers
Langevin Learning Services
- Impact of Divorce on Estate Planning
Institute of Certified Financial Planners
- Managing Customer Relationships
Hawaiian Educational Council

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- Philip E. Heckerling Institute on Estate Planning
University of Miami Law Center
- Sales Training Program
Cannon Financial Institute
- The Budget and Taxes: How they affect financial planning
Institute of Certified Financial Planners
- Trust Accounting
American Institute of Bankers
- Twenty Five Creative Ways to Add Excitement to Your Training
Langevin Learning Services
- Wills, Trusts, Probate and Inheritance Taxes
University of Hawaii, Richardson School of Law

Featured Speaker & Lecturer

- Cannon Schools Faculty
- Financial Planning Association National Conference
- BMA National Sales Conference
- Illinois CPA Society Conference
- Charles Schwab IMPACT conference
- Pennsylvania State Bankers Association Trust Conference
- AITCO (Association of Independent Trust Companies) Conference
- MOKAN conference
- Tri-State Trust Conference
- Indiana Bankers Association