



AMANDA L. HERRICK SMITH, CFP®

Senior Advisor

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EDUCATION/CREDENTIALS

2011 Certified Financial Planner® Practitioner

2006 State University of New York, College of Technology at Alfred, Bachelor of Business Administration in Financial Planning (Summa Cum Laude)

Member of the Financial Planning Association

ABOUT

Amanda's upbringing in rural New York instilled the value and satisfaction of productive work. She understands that clients have worked hard to obtain their own successes and she is highly dedicated to help others achieve their financial wants, needs, and dreams. Amanda believes that there is more to financial planning than number crunching, it is an educational experience we share with others to help make sound decisions we can feel good about.

Amanda joined John G. Ullman & Associates, Inc. in 2006 after obtaining her Bachelors in Financial Planning. She works with clients as a Senior Advisor to develop, coordinate, implement, and monitor all aspects of their financial plans.

CONCENTRATIONS

Financial Plan Development
Retirement Planning
Education Planning
Tax Planning and Preparation
Employee Benefits Planning
Investments
Insurance Review
Estate Planning



**John G. Ullman
& Associates, Inc.**
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