


SALES INTELLIGENCE PROFILE - PERSON

Full Name	Joseph Charles Smith, Jr.
Nickname	Joe
Age	43 years old; Born in November, 1968
Photo	
Company / Firm Information	<p><u>Smith, Harris, and Associates</u> (CPA firm) – 2003 to present – Owner/Partner http://www.smith-harris.com/ Smith, Harris specializes in tax and financial planning, to include retirement and estate planning, stock options, and risk management. He also has experience working with corporations and partnerships regarding tax planning issues, benefit planning, budget structure, and internal controls. The firm has approximately 14 employees, and does about a \$2.5 million in annual revenue.</p>
Family Information	<p>Joe is currently married to Virginia “Gin” Anne Smith, (formerly Virginia Ann Richter) since 1995; Four children – one daughter: Madeline; three sons: Sam, Brian, & James</p> <p>Gin is a Substitute Teacher for School District 112 which covers the Eastern Carver County schools. Gin is also an active distance runner. She took part in the St. Patrick’s Day 7k, the Arboretum Bud Break 5k and the Chaska Turkey Trot 5k.</p>

	<p>We believe that Joe was previously married to Helen, whose maiden name was Helen Jane Freeman, and that they divorced in 1991. They had no children together.</p> <p>Joe's parents, Joe (Sr.) and Pamela, appear to have given birth to Joe in their mid-to-late teenage years; their relationship did not last. His father went on to marry two more times, and has settled down in Eden Prairie, Minnesota with his third wife, Mary. His mother has remarried and lives with her husband, Fred Rodgers, in Chaska, Minnesota. We believe that Joe has a sister, Michelle, and that she lives in Cambridge, Minnesota.</p>
Lifestyle	<p>Joe and Gin drive modest vehicles, including a 2004 Mitsubishi Diamante and a 2010 Chrysler Town & Country minivan.</p>
Residential History	<p>Currently lives in Victoria, MN in a two-story home valued at \$329,100.00 in a neighborhood where census data shows the average median income is \$70,263.00; Appears to be lifelong Minnesota resident</p>
Education	<p>University of Minnesota – Bachelor of Science, Accounting, 1994 (Magna Cum Laude)</p>
Hobbies / Interests	<p>Golfing; May also be a distance runner with his wife, as the Miracles of Mitch Foundation holds annual distance runs and triathlon fundraisers in the summer.</p>
Community Involvement	<p>Victoria and Chaska Chamber of Commerce (now known as the SouthWest Metro Chamber of Commerce).</p>
Philanthropic / Charity Involvement	<p>Chaska Rotary - The Chaska Rotary Club meets on Thursdays at 7:15 am at the Hazeltine National Golf Club, located at 1900 Hazeltine Boulevard, Chaska, MN 55318.</p> <p>Member of the Executive Committee and Board Treasurer for the Miracles of Mitch Foundation, a non-profit foundation that provides support to families of children with cancer; Joe donates an average of four hours of his personal time per week to the charity.</p> <p>http://www.miraclesofmitch.org/documents/2010-2011MOMF990FINAL_000.pdf</p> <p>He and his wife also donated \$250.00 or more to the Down Syndrome Association of Minnesota in</p>

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	2011. Gin was a participant in the Polar Bear plunge to raise money for Special Olympics in 2012.
Religious Affiliation	Catholic
Political Affiliation	Most likely Republican/Conservative
LinkedIn	https://www.linkedin.com/?????????
Facebook	No profile found for Joe. Gin's Facebook profile (log into Facebook first): https://www.facebook.com/profile.php?????????
Twitter	@?????????????
Google +	No profile found
Blogs / Personal Website	None found
Recent Media / P.R.	None found
Work History	<u>Smith, Henke, and Associates</u> (CPA firm) – 2003 to present – Owner/Partner <u>Ryan Jones & Associates CPAs</u> – 2003 to 2004 – Manager <u>Watermark Financial, Inc.</u> – 2004 to 2011 – President <u>Edward M Ryan CPAs</u>
Certifications	Personal Financial Specialist (PFS); Certified Financial Planner (CFP)
Professional Licensing	Certified Public Accountant (CPA) since 1998
Professional Associations	American Institute of Certified Public Accountants (AICPA); Minnesota Society of CPAs (MNCPA)
Awards / Achievements	None found
Miscellaneous	Work Phone: (952) 448-0000 Work Email: Joe@smith-harris.com/

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