

Firm Brochure Supplement

Form ADV Part 2B



4/17/2023

This brochure supplement provides information about the Principals and Investment Advisor Representatives named below and supplements the Smith Shellnut Wilson, LLC brochure (Form ADV Part 2A). You should have received a copy of that brochure. Please contact us at 601-605-1776 if you did not receive Smith Shellnut Wilson, LLC's brochure or if you have any questions about the contents of this supplement.

Firm:

Smith Shellnut Wilson, LLC
661 Sunnybrook Rd. Suite 130
Ridgeland, MS 39157
601-605-1776

Investment Advisor Representatives:

Frank W. Smith Jr., Founder and CEO
William P. Johnson Jr., Principal
Frank W. Smith, III, CFA, Principal
R. Brian Fioretti, Senior Vice President
Belinda A. Fields, Relationship Manager
D. Dodd Williams, CFA, Senior Vice President
L. Brittany Eikner, CFP®, Financial Planner
J. Russell Guess, VP, Financial Institutions Sales
Chad McKeithen, Managing Director, Head of Depository Strategy
Matt Thompson, CFA, Director, Asset Liability Management

Frank W. Smith Jr., Principal, Founder and CEO



Born: 1953

Educational Background and Business Experience

Education

- ✓ Rollins College; BA, Business Administration, BA Economics, 1975
- ✓ Delta State University; MBA, 1977
- ✓ University of Illinois; National School of Bank Investments, 1978
- ✓ Louisiana State University; School of Banking of the South, 1985

Business Experience

- ✓ Smith Shellnut Wilson, LLC; CEO and CCO; 1995 - Present
- ✓ Sunburst Bank; Senior Executive Vice President; 1984 - 1995
- ✓ First Greenville Bank; VP, Commercial Loan Officer and Investment Officer; 1976 - 1983

Disciplinary Information

Frank Smith has no reportable disciplinary history.

Other Business Activities

Investment-Related Activities

Frank Smith is not engaged in any other investment-related activities. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products.

Non-Investment-Related Activities

Frank Smith is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Additional Compensation

Frank Smith does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Frank Smith is supervised by the Executive Committee of Smith Shellnut Wilson.

William P. Johnson Jr., Principal, CFO



Born: 1973

Educational Background and Business Experience

Education

- ✓ Mississippi State University; BS, 1994

Business Experience

- ✓ Smith Shellnut Wilson, LLC; Principal, 1995 - Present

Disciplinary Information

Will Johnson has no reportable disciplinary history.

Other Business Activities

Investment-Related Activities

Will Johnson is not engaged in any other investment-related activities. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products.

Non-Investment-Related Activities

Will Johnson is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Additional Compensation

Will Johnson does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Will Johnson is supervised by the Executive Committee of Smith Shellnut Wilson.

Frank W. Smith III, CFA, Principal



Born: 1978

Educational Background and Business Experience

Education

- ✓ Delta State University; BS, 2001
- ✓ Millsaps College; MBA, 2002

Business Experience

- ✓ Smith Shellnut Wilson, LLC; Principal; 2005 - Present
- ✓ BankPlus; Wealth Management Portfolio Analyst; 2002 - 2005

Designations

- ✓ Chartered Financial Analyst (CFA); CFA Institute; 2012

Disciplinary Information

Frank Smith has no reportable disciplinary history.

Other Business Activities

Investment-Related Activities

Frank Smith is not engaged in any other investment-related activities. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products.

Non-Investment-Related Activities

Frank Smith is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Additional Compensation

Frank Smith does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Frank Smith is supervised by the Executive Committee of Smith Shellnut Wilson.

R. Brian Fioretti, Senior Vice President



Born: 1984

Educational Background and Business Experience

Education

- ✓ Mississippi College; BS, 2006

Business Experience

- ✓ Smith Shellnut Wilson, LLC; Investment Analyst, 2006 - Present

Disciplinary Information

Brian Fioretti has no reportable disciplinary history.

Other Business Activities

Investment-Related Activities

Brian Fioretti is not engaged in any other investment-related activities. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products.

Non-Investment-Related Activities

Brian Fioretti is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Additional Compensation

Brian Fioretti does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Brian Fioretti is supervised by Frank Smith III and the Executive Committee of Smith Shellnut Wilson.

Belinda A. Fields, Relationship Manager



Born: 1963

Educational Background and Business Experience

Education

- ✓ Mississippi State University; BBA, 1985
- ✓ Mississippi State University; MBA, 1986

Business Experience

- ✓ Smith Shellnut Wilson, LLC; Relationship Manager, 2014 - Present
- ✓ State Bank & Trust Company; Vice President; 2009 - 2013
- ✓ BancorpSouth Investments; Vice President; 1999 - 2008
- ✓ Deposit Guaranty Corporation; Vice President; 1986 - 1998

Disciplinary Information

Belinda Fields has no reportable disciplinary history.

Other Business Activities

Investment-Related Activities

Belinda Fields is not engaged in any other investment-related activities. She does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products.

Non-Investment-Related Activities

Belinda Fields is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

Additional Compensation

Belinda Fields does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Belinda Fields is supervised by Frank Smith Jr. and the Executive Committee of Smith Shellnut Wilson.

D. Dodd Williams, CFA, Senior Vice President



Born: 1968

Educational Background and Business Experience

Education

- ✓ Millsaps College; BBA, 1990

Business Experience

- ✓ Smith Shellnut Wilson, LLC; Senior Vice President; 2019 - Present
- ✓ Suntrust; Portfolio Strategist; 2012-2018
- ✓ Morgan Keegan; Portfolio Strategist; 1997-2012
- ✓ Delta Life & Annuity Company; Portfolio Manager; 1994-1997
- ✓ Loomis Sayles; Assistant Options Manager; 1990-1992

Designations

- ✓ Chartered Financial Analyst (CFA); CFA Institute; 1997

Disciplinary Information

Dodd Williams has no reportable disciplinary history.

Other Business Activities

Investment-Related Activities

Dodd Williams is not engaged in any other investment-related activities. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products.

Non-Investment-Related Activities

Dodd Williams is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Additional Compensation

Dodd Williams does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Dodd Williams is supervised by Frank Smith III and the Executive Committee of Smith Shellnut Wilson.

L. Brittany Eikner, CFP® - Financial Planner



Born: 1987

Educational Background and Business Experience

Education

- ✓ Delta State University; B.S. in Mathematics, 2010
- ✓ Delta State University; M.Ed, 2012

Business Experience

- ✓ Smith Shellnut Wilson, LLC; Financial Planner, 2021 - Present
- ✓ Smith Shellnut Wilson, LLC; Operations Specialist, 2013 - 2021

Disciplinary Information

Brittany Eikner has no reportable disciplinary history.

Other Business Activities

Investment-Related Activities

Brittany Eikner is not engaged in any other investment-related activities. She does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products.

Non-Investment-Related Activities

Brittany Eikner is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

Additional Compensation

Brittany Eikner does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Brittany Eikner is supervised by Frank Smith III and the Executive Committee of Smith Shellnut Wilson.

J. Russell Guess, VP, Financial Institutions Sales

Born: 1982

Educational Background and Business Experience



Education

- ✓ Mississippi State University, BS, Business Administration, 2004
- ✓ Millsaps College, MBA, 2008
- ✓ University of Mississippi, The Mississippi School of Banking, 2015

Business Experience

- ✓ Smith Shellnut Wilson, LLC; VP, 2021 - Present
- ✓ Texas Capital Bank, SVP, 2018-2021
- ✓ Federal Home Loan Bank of Dallas, Relationship Manager, 2015-2018
- ✓ Regions Financial Corporation, VP, 2013-2014
- ✓ BancorpSouth Bank, VP, 2008-2013
- ✓ Regions Financial Corporation, Credit Underwriter, 2006-2008
- ✓ United States Marine Corps, Sergeant (e-5), 2000-2006

Disciplinary Information

Russell Guess has no reportable disciplinary history.

Other Business Activities

Investment-Related Activities

Russell Guess is not engaged in any other investment-related activities. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products.

Non-Investment-Related Activities

Russell Guess is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Additional Compensation

Russell Guess does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Russell Guess is supervised by the Executive Committee of Smith Shellnut Wilson.

Chad McKeithen, Managing Director, Head of Depository Strategy



Born: 1971

Educational Background and Business Experience

Education

- ✓ University of Mississippi, BBA, 1996

Business Experience

- ✓ Smith Shellnut Wilson, LLC; Managing Director, 2022 - Present
- ✓ Duncan-Williams; Managing Director, Head of Strategies/Research, 2011 – 2022
- ✓ FHN Financial; VP, Derivatives & Balance Sheet Management, 1996 – 2011

Disciplinary Information

Chad McKeithen has no reportable disciplinary history.

Other Business Activities

Investment-Related Activities

Chad McKeithen is not engaged in any other investment-related activities. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products.

Non-Investment-Related Activities

Chad McKeithen is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Additional Compensation

Chad McKeithen does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Chad McKeithen is supervised by the Executive Committee of Smith Shellnut Wilson.

Matt Thompson, CFA, Director, Asset Liability Management



Born: 1986

Educational Background and Business Experience

Education

- ✓ Louisiana State University; BS, 2008

Business Experience

- ✓ Smith Shellnut Wilson, LLC; Director, 2022 - Present
- ✓ Truist Securities; Director, ALM; 2019 - 2022
- ✓ FHN Financial; Vice President; 2008 - 2018

Designations

- ✓ Chartered Financial Analyst (CFA); CFA Institute; 2013

Disciplinary Information

Matt Thompson has no reportable disciplinary history.

Other Business Activities

Investment-Related Activities

Matt Thompson is not engaged in any other investment-related activities. He does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products.

Non-Investment-Related Activities

Matt Thompson is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Additional Compensation

Matt Thompson does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Supervision

Matt Thompson is supervised by the Executive Committee of Smith Shellnut Wilson.