

CALPRO



Kyle Smith

Director, CALPRO Network
Financial Advisor

10085 Carroll Canyon Rd. #150
San Diego, CA, 92131
(619) 260-0155
kyle@calpronetwork.com

Experience and Licenses

Kyle boasts over a decade of experience within the financial services sector. However, his connection to CALPRO runs much deeper, as he has been an integral part of the company since its inception over 35 years ago by his father. He takes immense pride in carrying forward the CALPRO legacy.

Through his meticulous planning process, Kyle aids his clients in uncovering their genuine financial aspirations, fostering a positive relationship with their finances. This approach empowers them to pursue both short-term and long-term objectives. Kyle's primary goal is to serve as a financial coach, working in close collaboration with his clients to provide clear explanations of each plan in a manner that is easily comprehensible.

Kyle firmly adheres to the "Three P's," which form the bedrock of the client experience:

1. **Purpose:** This involves setting clear goals and recognizing the constructive role money plays in achieving them.
2. **Planning:** Creating a systematic, step-by-step approach to help clients reach their goals and maintain focus.
3. **Peace of Mind:** Ensuring clients have a well-defined plan in place and a dedicated coach to keep them on track and prevent deviations.

Kyle's primary area of concentration lies in working with educators and their families. Being the son of a retired elementary school principal, he derives great satisfaction from assisting individuals who have dedicated their careers to shaping the lives of our children.

Kyle currently holds a Series 6, Series 63, Series 65 and Life & Health Insurance License.

Accolades and Personal Interests

Beyond the office, you'll often find Kyle coaching little league activities in Poway, performing music in the local scene with his band, "The Traveling Nobody's." or enjoying leisure time on the golf course. He's also a fan of hockey, avidly supports Michigan Football (GoBlue), and relishes quality moments with his wife, Brittany, and their two children, Paige and Carter.