



Top: Jim Lawrence, Gary Shufford, Wes Boyce, David Dameron
Middle: Mei Au, Linda Schafer, Nancy Barnes, Pat Nix, Donna Lindley, Heidi Dannelly
Bottom: Ken Vilcheck, Philip Brice, Jeremy Elliott, Allen Gillespie
Not Pictured: Patricia Smith, Amy Collier

Elliott Davis Investment Partners



The mission for Elliott Davis Investment Partners is to create objective and competent investment solutions that are customized to meet the needs of individuals, companies, endowments and foundations.

This partnership is being formed from the combination of two investment advisory firms, Hamilton Joseph Investment Consulting and Elliott Davis Wealth Management, both with extensive background in offering investment advisory services. The range of services offered includes fiduciary investment consulting to corporate retirement plans, high net worth individuals, endowments and foundations,

financial and estate planning, and wealth management. Comprehensive solutions in all of these areas require a high level of expertise. EDI Partners brings together unparalleled experience with a team of 16 professionals including the following:

- 2 Certified Public Accountants – CPA
- 4 Certified financial Planners – CFP
- 3 Accredited Investment Fiduciaries – AIF
- 2 Chartered Financial Analysts – CFA
- 2 Operational professionals with over 20 years experience

HAMILTON JOSEPH

Hamilton Joseph, was formed in mid 2002 by Philip Brice and Ken Vilcheck, who have over 50 years combined experience in investment consulting. Formerly with the Consulting Services Division of one of the largest financial services companies in the world, Hamilton Joseph has a long history of consulting to corporate retirement plans, foundations and endowments, and high net worth individuals.

Corporate retirement plans, foundations and endowments continue to be faced with unique fiduciary requirements and must meet financial objectives of the underlying organization. Plan sponsors face the challenge of overseeing investment options offered through the plan and then helping their employees to plan and meet retirement goals. Plan committee members (fiduciaries) need independent, objective consulting, and plan participants need objective financial and retirement planning. Committee members of foundations and endowments are also challenged with meeting long-term financial objectives of the underlying organization and need objective, unbiased investment consulting with proper asset modeling and control of both risk and costs associated with their investments.

ELLIOTT DAVIS WEALTH MANAGEMENT

Elliott Davis Wealth Management was formed in 2000 by Elliott Davis LLC, one of the Southeast's largest accounting and business advisory firms. The entity was created to provide objective and competent investment advice primarily to Elliott Davis clients. The new division was formed and headed by Jeremy Elliott. The EDWM team provides comprehensive financial, estate and wealth management solutions for the customized needs of their clients.

Individuals are faced with numerous financial challenges with a need for in-depth expertise. Some of these challenges include determining income needs at retirement, investing the proceeds of a business sale, saving for college education, estate planning, and investment analysis and management. All of these represent opportunities for intelligent planning that includes consideration of relevant tax laws. Due to the complex nature of advising in all of these areas, EDWM employs a team of experienced advisors which work together to meet the needs of clients. Additionally, the resources of the accounting firm are engaged to make sure that advice is consistent and coordinated.



Philip Brice



Jeremy Elliott



Ken Vilcheck



David Dameron



Allen Gillespie

For more information, please call one of our offices.

Hamilton Joseph: 864.288.2849

Elliott Davis Wealth Management: 864.242.3370