



**Weaver Capital Management, LLC**

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**March 30, 2011 Brochure**

This brochure provides information about the qualifications and business practices of Weaver Capital Management, LLC ("WCM"). If you have any questions about the contents of this brochure, please contact us at (678) 341-1333 or [invest@WeaverCapital.com](mailto:invest@WeaverCapital.com). The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state authority.

Additional information about WCM also is available on the SEC's website at  
[www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

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## ***Advisory Business***

### **General Information**

Weaver Capital Management, LLC (WCM) is a Registered Investment Advisory Firm that provides private wealth management and discretionary investment management services to its clients. WCM practices a fee-only business model and is compensated by a percentage of assets under management. This fee-only platform places WCM in a fiduciary role, thereby minimizing the inherent conflicts of interest found so frequently in traditional brokerage firms.

Founded in 2005, WCM has a heritage that dates back over 20 years when DeWitt Weaver, III started Linksman Financial in 1990. The firm's faith-based values have always been the cornerstone of developing and implementing sound financial plans for clients.

In the typical client relationship, WCM assists clients with long and short term financial goals, lifestyle expenses, retirement, education and estate plans. The firm's specialized financial planning enables each client to view in-depth projections regarding multiple aspects of their financial future. At the core, WCM offers to each client a diligent investment management process based on sound principals of risk management.

WCM offers two levels of fee-only management services to clients: Investment Management and Wealth Management as described below.

### **Investment Management**

For Investment Management clients WCM generally will:

- Develop an Investment Strategy based on the client's unique goals and needs
- Manage client's portfolio in alignment with their investment strategy
- Provide quantitative target goal projections and analysis for Retirement and/or College
- Provide quarterly itemized reporting on investment performance
- Invest client assets in Weaver Capital Models with Directional Hedging Risk Management
- Offer a referral network to CPAs, Attorneys or Agents

Each client is taken through an extensive questionnaire to evaluate their attitudes towards risk. WCM will use the results of this questionnaire along with other client assessments to assign the client into one of four WCM investment models: Strategic Growth, Strategic Balanced, Strategic Conservative and Strategic Preservation.

### **Wealth Management**

For the Wealth Management offering, in addition to the Investment Management services above WCM generally will:

- Prepare a Comprehensive Financial Plan
- Plot a course for the achievement of financial independence
- Provide assistance with setting other financial goals
- Design a Personal Cash Flow Management System
- Develop charitable giving strategies
- Review and recommend tax strategies
- Develop an Estate Plan and assess potential estate tax liability
- Evaluate Life, Disability and Long-Term Care Insurance needs
- Collaborate with client's other professionals for implementation

Both service offerings above incorporate the Portfolio Management services detailed below:

#### Portfolio Management

After the completion of an extensive risk-tolerance questionnaire, WCM assesses the client's market experience, time horizon, liquidity constraints and any other information vital to their Investment Plan. Based on the results of this analysis, WCM presents an Investment Model to the client that best aligns with the client's ability to tolerate risk. After reviewing the market exposure, target returns and risks of the recommended Investment Model, WCM validates the selection with the client.

The Investment Plan will be updated when requested by the client, or when determined to be necessary or advisable by WCM based on updates to the client's financial or other circumstances.

To implement the client's Investment Plan, WCM will manage the client's investment portfolio on a discretionary basis. As a discretionary investment adviser, WCM will have the authority to direct the portfolio in the best interest of the client based on their Investment Plan, without receiving the client's approval for each underlying transaction.

Additionally, clients may impose certain written restrictions on WCM in the management of their investment portfolios, such as prohibiting the inclusion of certain types of investments (e.g., "sin stocks") in an investment portfolio or prohibiting the sale of certain investments held in the account at the commencement of the relationship. Each client should note, however, that restrictions imposed by a client may adversely affect the composition and performance of the client's investment portfolios. For these and other reasons, performance of client investment portfolios within the same investment objectives, goals and/or risk tolerance may differ. Furthermore, clients should not expect that the composition or performance of their investment portfolios would necessarily be consistent with clients in similar Investment Models of WCM.

#### Principal Owners

DeWitt T. Weaver, III is the principal owner of WCM. Please see "Brochure Supplement(s)" for information on DeWitt and other WCM individuals who formulate investment advice and have discretionary authority over client accounts.

#### Type and Value of Assets Currently Managed

As of February 28, 2011, WCM managed \$57,562,000 on a discretionary basis, and no assets on a non-discretionary basis.

#### ***Fees and Compensation***

##### Portfolio Management Fees

WCM practices a fee-only business model and is compensated from a percentage of assets under management. The annual fee schedule is as follows:

<u>Account Balance</u>	<u>Annual Fee</u>
Portfolios under \$100,000	(See below)*
\$100,001 - \$1,000,000	1.00%
\$1,000,001 - \$3,000,000	0.90%
\$3,000,001 - \$5,000,000	0.80%
Portfolios above \$5,000,001	0.70%

\* A minimum annual fee of \$1,000 will be charged for Investment Management Services.

Portfolio management fees are generally payable quarterly, in advance. Fees are prorated for cash flows exceeding \$5,000. If management begins after the start of a quarter, fees will be prorated accordingly. Fees are normally debited directly from client account(s), unless other arrangements are made.

Fees paid to WCM are exclusive of all custodial and transaction costs paid to the client's custodian, brokers or other third party consultants. Fees paid to WCM are also separate and distinct from the fees and expenses charged by mutual funds, ETFs (exchange traded funds) or other investment pools to their shareholders (generally including a management fee and fund expenses, as described in each fund's prospectus or offering materials). The client should review all fees charged by WCM, funds, custodians and others to fully understand the total amount of fees paid by the client for investment and financial-related services.

Either WCM or the client may terminate their Investment Management Agreement at any time, subject to any written notice requirements in the agreement. In the event of termination, any paid but unearned fees will be promptly refunded to the client, and any fees due to WCM from the client will be invoiced or deducted from the client's account prior to termination.

#### Financial Planning Fees

Clients in the "Investment Management" service offering may engage in the enhanced "Wealth Management" planning service for the following one-time fee:

<u>Assets Under Management</u>	<u>One-Time Wealth Management Fee</u>
Portfolios under \$500,000	\$2,500
\$500,000 - \$750,000	\$1,000
Portfolios above \$750,000	No Additional Fee

#### ***Performance-Based Fees and Side-By-Side Management***

WCM does not accept performance-based fees of any kind.

#### ***Types of Clients***

WCM works with individuals, pension and profit-sharing plans, corporations, trusts, estates and charitable organizations. With some exceptions, the minimum portfolio value eligible for investment management services is \$100,000, and the annual minimum fee charged is \$1,000. Under certain circumstances and in its sole discretion, WCM may negotiate such minimums.

#### ***Methods of Analysis, Investment Strategies and Risk of Loss***

##### Methods of Analysis and Investment Strategies

In accordance with the Investment Plan, WCM utilizes "Multi-Dimensional Strategic Asset Allocation". This active strategy is far from "Buy and Hold". WCM's Investment Models incorporate Global Equity Funds of all market caps, Alternative Investment Funds and Fixed Income Funds that exhibit consistent top tier performance. To further exercise prudent risk management, the firm incorporates a Directional Strategy that utilizes ETFs (exchange-traded funds) to adjust risk levels in portfolios during times of negative market momentum and high market volatility. To meet client needs across a broad spectrum, WCM offers four distinct model allocations: Strategic Growth, Strategic Balanced, Strategic Conservative and Strategic Preservation.

In making selections of investments for client portfolios, WCM may use any of the following types of analysis:

**Fundamental Analysis** – involves review of the business and financial information about an issuer.

**Charting Analysis** – involves gathering and processing price and volume information for a particular security.

**Technical Analysis** – involves studying past price patterns and trends in the financial markets to predict the direction of both the overall market and specific stocks.

**Cyclical Analysis** – is a type of technical analysis that involves evaluating recurring price patterns and trends.

WCM primarily invests in mutual funds for clients' accounts. Mutual funds are generally evaluated and selected based on a variety of factors, including, without limitation, past performance, fee structure, portfolio manager, fund sponsor, overall ratings for safety and returns, and other factors. Specifically, WCM begins with an overview of the more than 4,500 funds available at Charles Schwab & Co., Inc., the custodian of choice for WCM. The selection process begins by identifying quality funds in four primary areas: US Stock funds; International funds; fixed income funds, and alternative funds. The field is then narrowed by identifying the top 10% of each group in terms of its three-year total return and its three-year Sortino ratio, which is a risk-adjusted measure of performance. The risk/reward relationship is further explored by evaluating the standard deviation of a fund's performance, as well as other statistical studies. Finally, a comprehensive analysis is undertaken, evaluating the fund's management, macro market conditions, specific holdings in the fund, the net long and short positions in the fund, and other factors.

Direct fixed income investments may be used as a strategic investment, as an instrument to fulfill liquidity or income needs in a portfolio, or to add a component of capital preservation. WCM may evaluate and select individual bonds or bond funds based on a number of factors including, without limitation, rating, yield and duration.

#### Risk of Loss

While WCM seeks to diversify clients' investment portfolios across various asset classes consistent with their Investment Plans in an effort to reduce risk of loss, all investment portfolios are subject to risks. Accordingly, there can be no assurance that client investment portfolios will be able to fully meet their investment objectives and goals, or that investments will not lose money.

Below is a description of several of the principal risks that client investment portfolios face.

*Management Risks.* While WCM manages client investment portfolios based on WCM's experience, research and proprietary methods, the value of client investment portfolios will change daily based on the performance of the underlying mutual funds and other securities in which they are invested. Accordingly, client investment portfolios are subject to the risk that WCM allocates investment funds to asset classes that are adversely affected by unanticipated market movements, and the risk that WCM's specific investment choices could underperform their relevant indexes.

*Risks of Investments in Mutual Funds, ETFs and Other Investment Pools.* As described above, WCM will invest client portfolios in mutual funds, ETFs and other investment pools ("pooled investment

funds”). Investments in pooled investment funds are generally less risky than investing in individual securities because of their diversified portfolios; however, these investments are still subject to risks associated with the markets in which they invest. In addition, pooled investment funds’ success will be related to the skills of their particular managers and their performance in managing their funds. Pooled investment funds are also subject to risks due to regulatory restrictions applicable to registered investment companies under the Investment Company Act of 1940.

*Equity Market Risks.* WCM may invest portions of client assets directly into equity investments, primarily stocks, or into pooled investment funds that invest in the stock market. As noted above, while pooled investments have diversified portfolios that may make them less risky than investments in individual securities, funds that invest in stocks and other equity securities are nevertheless subject to the risks of the stock market. These risks include, without limitation, the risks that stock values will decline due to daily fluctuations in the markets, and that stock values will decline over longer periods (e.g., bear markets) due to general market declines in the stock prices for all companies, regardless of any individual security’s prospects.

*Fixed Income Risks.* WCM may invest portions of client assets directly into fixed income instruments, such as bonds and notes, or may invest in pooled investment funds that invest in bonds and notes. While investing in fixed income instruments, either directly or through pooled investment funds, is generally less volatile than investing in stock (equity) markets, fixed income investments nevertheless are subject to risks. These risks include, without limitation, interest rate risks (risks that changes in interest rates will devalue the investments), credit risks (risks of default by borrowers), or maturity risk (risks that bonds or notes will change value from the time of issuance to maturity).

*Foreign Securities Risks.* WCM may invest portions of client assets into pooled investment funds that invest internationally. While foreign investments are important to the diversification of client investment portfolios, they carry risks that may be different from U.S. investments. For example, foreign investments may not be subject to uniform audit, financial reporting or disclosure standards, practices or requirements comparable to those found in the U.S. Foreign investments are also subject to foreign withholding taxes and the risk of adverse changes in investment or exchange control regulations. Finally, foreign investments may involve currency risk, which is the risk that the value of the foreign security will decrease due to changes in the relative value of the U.S. dollar and the security’s underlying foreign currency.

### ***Disciplinary Information***

WCM has no disciplinary events to report.

### ***Other Financial Industry Activities and Affiliations***

WCM has no other financial industry activities or affiliations.

### ***Code of Ethics, Participation or Interest in Client Transactions and Personal Trading***

#### **Code of Ethics and Personal Trading**

WCM has adopted a Code of Ethics (“the Code”), the full text of which is available to you upon request. WCM’s Code has several goals. First, the Code is designed to assist WCM in complying with applicable laws and regulations governing its investment advisory business. Under the Investment Advisers Act of 1940, WCM owes fiduciary duties to its clients. Pursuant to these

fiduciary duties, the Code requires WCM associated persons to act with honesty, good faith and fair dealing in working with clients. In addition, the Code prohibits associated persons from trading or otherwise acting on insider information.

Next, the Code sets forth guidelines for professional standards for WCM's associated persons (managers, officers and employees). Under the Code's Professional Standards, WCM expects its associated persons to put the interests of its clients first, ahead of personal interests. In this regard, WCM associated persons are not to take inappropriate advantage of their positions in relation to WCM clients.

Third, the Code sets forth policies and procedures to monitor and review the personal trading activities of associated persons. From time to time WCM's associated persons may invest in the same securities recommended to clients. Under its Code, WCM has adopted procedures designed to reduce or eliminate conflicts of interest that this could potentially cause. The Code's personal trading policies include procedures for limitations on personal securities transactions of associated persons, reporting and review of such trading and pre-clearance of personal trading activities. These policies are designed to discourage and prohibit personal trading that would disadvantage clients. The Code also provides for disciplinary action as appropriate for violations.

#### Participation or Interest in Client Transactions

Because client accounts are invested almost exclusively in open-end mutual funds and ETF's, there is little opportunity for a conflict of interest between personal trades by WCM associated persons and trades in client accounts, even when such accounts invest in the same securities. However, in the event of any potential trading conflicts of interest, WCM's goal is to place client interests first.

Consistent with the foregoing, WCM maintains policies regarding participation in initial public offerings (IPOs) and private placements in order to comply with applicable laws and avoid conflicts with client transactions. If a WCM associated person wishes to participate in an IPO or invest in a private placement, he or she must submit a pre-clearance request and obtain the approval of the Chief Compliance Officer.

When associated persons trade with client accounts (e.g., in a bundled or aggregated trade), and the trade is not filled in its entirety, the associated person's shares will be removed from the block, and the balance of shares will be allocated among client accounts in accordance with WCM's written policy.

#### ***Brokerage Practices***

##### Best Execution and Benefits of Brokerage Selection

When given discretion to select the brokerage firm that will execute orders in client accounts, WCM seeks "best execution" for client trades, which is a combination of a number of factors, including, without limitation, quality of execution, services provided and commission rates. Therefore, WCM may use or recommend the use of brokers who do not charge the lowest available commission in the recognition of research and securities transaction services, or quality of execution. Research services received with transactions may include proprietary or third party research (or any combination), and may be used in servicing any or all of WCM's clients. Therefore, research services received may not be used for the account for which the particular transaction was effected.

WCM participates in the Schwab Advisor Services ("SAS") program. While there is no direct link between the investment advice WCM provides and participation in the SAS program, WCM receives

certain economic benefits from the SAS program. These benefits may include software and other technology that provides access to client account data (such as trade confirmations and account statements), facilitates trade execution (and allocation of aggregated orders for multiple client accounts), provides research, pricing information and other market data, facilitates the payment of WCM's fees from its clients' accounts, and assists with back-office functions, recordkeeping and client reporting. Many of these services may be used to service all or a substantial number of WCM's accounts, including accounts not held at Schwab. Schwab may also make available to WCM other services intended to help WCM manage and further develop its business. These services may include consulting, publications and conferences on practice management, information technology, business succession, regulatory compliance and marketing. In addition, Schwab may make available, arrange and/or pay for these types of services to be rendered to WCM by independent third parties. Schwab may discount or waive fees it would otherwise charge for some of these services, pay all or a part of the fees of a third-party providing these services to WCM, and/or Schwab may pay for travel expenses relating to participation in such training. Finally, participation in SAS provides WCM with access to mutual funds which normally require significantly higher minimum initial investments or are normally available only to institutional investors.

The benefits received through participation in the SAS program do not necessarily depend upon the proportion of transactions directed to Schwab. The benefits are received by WCM, in part because of revenue generated for Schwab by WCM's clients. This means that the investment activity in client accounts is beneficial to WCM, because Schwab does not assess a fee to WCM for these services. This creates an incentive for WCM to continue to recommend Schwab to its clients. While it may be possible to obtain similar custodial, execution and other services elsewhere at a lower cost, WCM believes that Schwab provides an excellent combination of these services.

### ***Review of Accounts***

DeWitt Weaver, WCM's President, and John Castleberry, IA Representative, review all accounts monthly during scheduled Investment Committee Review meetings. Portfolio investments are tracked at least weekly, or more often if conditions merit or at the request of the client.

For clients under the Wealth Management service offering, financial plans are reviewed on an as needed or agreed upon basis.

Account custodians are responsible for providing monthly or quarterly account statements which reflect the positions, current pricing, transactions and fees paid. Account custodians also provide prompt confirmation of all trading activity, and year-end tax statements, such as 1099 forms. In addition, WCM generally provides a quarterly report for each managed portfolio. This written report normally includes a summary of portfolio holdings and performance results. Additional reports are available at the request of the client.

### ***Client Referrals and Other Compensation***

As noted above, WCM may receive some benefits from Schwab based on the amount of client assets held at Schwab. Please see ***"Brokerage Practices"*** for more information. However, neither Schwab nor any other party is paid to refer clients to WCM.

### ***Custody***

Charles Schwab & Co., Inc. is the primary custodian of WCM accounts. From time to time however, clients may select an alternate broker to hold accounts in custody. In any case, it is the custodian's



responsibility to provide clients with confirmations of trading activity, tax forms and at least quarterly account statements. Clients are advised to review this information carefully, and to notify WCM of any questions or concerns. Clients are also asked to promptly notify WCM if the custodian fails to provide statements on each account held.

From time to time and in accordance with WCM's agreement with clients, WCM will provide additional reports. The account balances reflected on these reports should be compared to the balances shown on the brokerage statements to ensure accuracy. At times there may be small differences due to the timing of dividend reporting and pending trades.

### ***Investment Discretion***

As described above under "**Advisory Business**", WCM manages portfolios on a discretionary basis. Therefore, after an Investment Plan is developed for the client's investment portfolio, WCM will execute that plan without specific consent from the client for each transaction. A Limited Power of Attorney ("LPOA") is executed by the client, giving WCM the authority to carry out various activities in the account, generally including the following: trade execution; the ability to request checks and journals on behalf of the client; and, the withdrawal of advisory fees directly from the account. The client may limit the terms of the LPOA to the extent consistent with the client's investment advisory agreement with WCM and the requirements of the client's custodian. The discretionary relationship is further described in the agreement between WCM and the client.

### ***Voting Client Securities***

With respect to securities selected on behalf of the client in a managed account or recommended to a client, WCM may vote proxies where required under client agreements. WCM seeks to vote proxies in the best interest of the client(s) holding the applicable securities. In voting proxies, WCM considers factors that WCM believes relate to the client's investment(s) and factors, if any, that are set forth in written instructions from the client.

In general, WCM believes that voting proxies in accordance with the following guidelines, with respect to such routine items, is in the best interests of our clients. Accordingly, WCM generally votes **for**:

- The election of directors (where no corporate governance issues are implicated);
- Proposals that strengthen the shared interests of shareholders and management;
- The selection of independent auditors based on management or director recommendation, unless a conflict of interest is perceived;
- Proposals that WCM believes may lead to an increase in shareholder value;
- Management recommendations adding or amending indemnification provisions in charter or by-laws; and
- Proposals that maintain or increase the rights of shareholders.

WCM will generally vote **against** any proposals that WCM believes will have a negative impact on shareholder value or rights. If WCM perceives a conflict of interest, WCM's policy is to notify affected clients so that they may choose the course of action they deem most appropriate.

A copy of our complete policy, as well as records of proxies voted; are available to clients upon request. As required under the Advisers Act, such records are maintained for a period of five (5) years.

***Financial Information***

WCM does not require nor solicit prepayment of more than \$1,200 in fees per client, six months or more in advance, and therefore has no required disclosure for this item.

**Brochure Supplement for**  
**DeWitt T. Weaver, III, CFP®**

of

**Weaver Capital Management, LLC**

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March 30, 2011

This brochure supplement provides information about DeWitt Weaver, and supplements the Weaver Capital Management, LLC ("WCM") brochure. You should have received a copy of that brochure. Please contact WCM at (678) 341-1333 if you did not receive WCM's brochure, or if you have any questions about the contents of this supplement.

Additional information about DeWitt Weaver is available on the SEC's website at  
[www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

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***Educational Background and Business Experience***

DeWitt T. Weaver, III (born in 1965) is President and founder of Weaver Capital Management, LLC. As a personal wealth advisor, DeWitt provides comprehensive investment and financial planning strategies to families and businesses. His commitment to his clients has gained him recognition as "Five Star Best in Client Satisfaction" by Atlanta Magazine for 2008, 2009 and 2010.

He began his advisory career in 1990 with the forming of Linksman Financial, a registered investment advisory firm dedicated to managing the financial affairs of professional golfers. Having pursued a professional golf career himself, he found that there was a great need amongst his peers for non-biased, personal financial advice. In 1996 he expanded his practice to provide comprehensive wealth management to individuals of all professions and later renamed the firm Weaver Capital Management, LLC. In 2006 DeWitt launched the Fisherman Fund, a private investment fund where he was lead portfolio manager. After a successful four year track record at the fund, his desire to focus his time with his clients led him to leave the management of the fund and dedicate his efforts to the advisory business.

DeWitt is a cum laude graduate of Southern Methodist University with a BA in Accounting and Finance. He attained the Certified Financial Planner\* (CFP®) designation in September of 1996 and is registered with the Certified Financial Planner Board of Standards. In 2010 he became a Qualified

Kingdom Advisor, which is a designation granted to Christian financial professionals who have completed extensive training in biblical stewardship.

DeWitt is an active member of Johns Creek Baptist Church and The Rotary Club of Johns Creek. Since 2002, DeWitt has led a weekly men's bible study group at his office. He supports many local and worldwide charities both personally and through the Weaver Capital Foundation. He is a member of the Atlanta Athletic Club and Laurel Springs Country Club and enjoys competing occasionally in local and national amateur golf events.

DeWitt makes his home in Suwanee, Georgia with his wife Michele and their four children Forde, Mary Evans, Jack and Landry.

\* The CFP® designation is granted by the Certified Financial Planner Board of Standards, Inc. (the "Board"). To attain the designation, the candidate must complete the required educational, examination and experience requirements set forth by the Board. The CFP® Certification Examination tests the candidate's ability to apply financial planning knowledge to client situations. The 10-hour exam is divided into three separate sessions over a 2-day period.

### ***Disciplinary Information***

There is no disciplinary information to report regarding DeWitt.

### ***Other Business Activities***

DeWitt is not engaged in any other investment-related business or occupation, and does not earn compensation for the sale of any other products or services.

### ***Additional Compensation***

As stated above, DeWitt has no other income or compensation to disclose.

### ***Supervision***

As President of Weaver Capital Management, LLC, DeWitt, supervises all duties and activities of the firm, and reviews all client accounts. His contact information is on the cover page of this disclosure document.

**Brochure Supplement for**  
**John W. Castleberry**  
**of**  
**Weaver Capital Management, LLC**

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March 30, 2011

This brochure supplement provides information about John Castleberry, and supplements the Weaver Capital Management, LLC ("WCM") brochure. You should have received a copy of that brochure. Please contact WCM at (678) 341-1333 if you did not receive WCM's brochure, or if you have any questions about the contents of this supplement.

Additional information about John Castleberry is available on the SEC's website at  
[www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov).

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***Educational Background and Business Experience***

John W. Castleberry (born in 1986) joined Weaver Capital Management, LLC in November of 2009. As a Support Advisor he assists with portfolio management, trade execution and implementation of financial plans. John is a member of the WCM Investment Committee where he conducts research and due diligence on investments.

He currently holds a Series 65 License (FINRA/NASAA Uniform Investment Advisor Law Exam).

John's interest in investment management began with a childhood fascination of capital markets and ultimately developed into a passion during his post-secondary education. After a brief tenure at a prominent broker/dealer, John quickly realized the need for unbiased, transparent investment advice and the value an Independent Investment Advisor provides.

John signed a football scholarship with Furman University, where he was a four-year letterman for the Paladins at safety and a three-time First Team Academic All-Southern Conference selection. He graduated with a B.A. in Communication Studies with a Business Concentration from Furman.

Outside of the office, John is Vice President and co-founder of The Mandy Dasher Foundation, Inc., a non-profit organization established to improve the quality of life for persons with developmental disabilities. His other community affiliations include Habitat for Humanity as well as being an active member of Oak Grove Baptist Church where he is involved with youth ministries.

John resides in Cumming, Georgia with his wife, Emily. In his spare time, he enjoys spending time with family, golf, tennis, attending sporting events, and fishing.

***Disciplinary Information***

There is no disciplinary information to report regarding John.

***Other Business Activities***

John is not engaged in any other business activities.

***Additional Compensation***

John has no other income or compensation to disclose.

***Supervision***

DeWitt Weaver, President of Weaver Capital Management, LLC, is responsible for supervising John Castleberry. DeWitt can be reached at (678) 341-1333.