

Charleston Financial Advisors, LLC

4 North Atlantic Wharf
Suite 200
Charleston, SC 29401

ADV Part 2 B BROCHURE SUPPLEMENT Education and Business Backgrounds

February 16, 2021

This applies to all persons listed below:

- There are no legal or disciplinary events to disclose.
- None are engaged in any investment-or non-investment related activity posing a conflict of interest with the firm's clients.
- From time to time, employees may receive addition compensation for growth of firm revenue.
- Advice rendered is subject to review by William C. Prewitt, Chief Compliance Officer, tel. 843-722-3331.

Name: Diane H. Blackwelder, CFP® (b. 1970) **Title:** Principal and Advisor

Education:

Certified Financial Planner™ (2005)

Bachelor of Science, Biology – College of Charleston (1992)

Experience:

Partner and Principal of Charleston Financial Advisors, LLC (2011-Present)

Financial Advisor – Charleston Financial Advisors, LLC (2008 – 2010)

Owner – Atlantic Planning Partners (2005-2008)

Planner – Questis Advisors (2007-2008)

Name: Myles B. Brandt, CFP® (b. 1984) **Title:** Principal and Advisor

Education:

M.S. in Applied Economics – Johns Hopkins University (2014)

Certified Financial Planner™ (2010)

Bachelor of Arts, History – College of Charleston (2006)

Bachelor of Arts, English – College of Charleston (2006)

Experience:

Principal of Charleston Financial Advisors, LLC (2018 to Present)

Portfolio Manager – Charleston Financial Advisors, LLC (2007- Present)

Front Desk Associate – Church Street Inn (2005-2009)

Name: Laura E. Holthaus, CFP®, RICP® (b. 1985) **Title:** Portfolio Manager

Education:

Retirement Income Certified Professional® (2018)
CERTIFIED FINANCIAL PLANNER™ (2017)
Applied Masters, Personal Financial Planning – University of Missouri – Columbia (2014)
Graduate Certificate, Personal Financial Planning – University of Missouri – Columbia (2012)
Bachelor of Science, Business Administration – Missouri Western State University (2007)
Bachelor of Science, Economics – Missouri Western State University (2007)

Experience:

Portfolio Manager – Charleston Financial Advisors, LLC (2021 to Present)
Chief Compliance Officer - Family Investment Center (2014 to 2019)
Investment Advisor – Family Investment Center (2009 to 2019)
Administrative Assistant – Family Investment Center (2008 to 2009)

Name: William. C. Prewitt, M.S., CFP® (b. 1946) **Title:** Chief Compliance Officer and Advisor

Education:

M.S. in Financial Planning – College for Financial Planning (1991)
Certified Financial Planner™ (1985)
National Executive Institute, Mendham, NJ (1971)
The Basic School, Quantico, VA (1968-1969)
Bachelor of Arts, History-Pre-Law, Transylvania University (1968)

Experience:

Chief Compliance Officer of Charleston Financial Advisors, LLC (2011 -Present)
Partner and Principal of Charleston Financial Advisors, LLC (2011-2017)
Owner and Principal of Charleston Financial Advisors, LLC (2004-2010)
Owner and Principal of Wm. C. Prewitt, M.S., CFP® (1986-2004)
Principal of Resource Development Corporation (1983-1986)

Charleston Financial Advisors, LLC requires those giving investment and financial planning advice to clients to have a CFP® designation or be a candidate for CFP® certification. The certification requirements include knowledge in areas designated in a topic list, passing the two-day CFP® certification exam, three years of full-time experience, and attesting to ethical disclosures. In addition, we have on staff, a Certified Divorce Financial Analyst; requirements for this certification include four modules of study and two years of experience in the financial or legal field.