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*Founder and President*

#### Practice Focus

- Corporate Services
- Comprehensive Financial Planning
- Retirement Income Planning
- Estate Planning Strategies
- Business Planning & Consulting
- Late Stage College Funding
- Philanthropic Endeavors

#### Education/Certification

- CERTIFIED FINANCIAL PLANNER™ professional (CFP®)
- CHARTERED RETIREMENT PLANNING COUNSELOR™ professional (CRPC™)
- Chartered Advisor in Philanthropy® (CAP™)
- BS in Business Administration, Lander University, SC

#### Affiliations

- Member, Financial Services Institute
- Member, Financial Planning Association
- Member, Greenville Estate Planning Council
- Voted Year 2000 Best & Brightest 35 and Under by Greenville Magazine

## Devery Rusty Cagle

CFP®, CRPC™, CAP™

Rusty Cagle brings almost a decade of experience advising individuals, professionals and businesses in a wide range of financial issues. He specializes in strategies for sustaining family legacies and preserving wealth. The focus is to create income that clients cannot outlive, improve returns, protect their principal and mitigate taxes.

Rusty is considered a knowledgeable guide, using objectivity and complete transparency to lead his clients through some of life's most challenging decisions. He is adamant that people need to reduce the emotional traps that often prevent their ability to make clear decisions concerning their financial future. By assisting clients in identifying their personal aspirations and most pressing concerns, he is able to develop the structure, competency and follow-through for implementation. He also believes in doing everything in his power to provide access to resources that can help solve an individual's unique and more complex financial challenges.

Rusty's extensive background in wealth management began at American Express Financial Advisors, Inc. where he was recognized with various awards including the President's Advisory Award for Quality of Objective Advice. He is one of a selected few chosen representatives in Securities America to participate in an elite program to serve the affluent marketplace through strategic alliances.

His commitment to a higher fiduciary standard of excellence led to obtaining the CERTIFIED FINANCIAL PLANNER™ professional certification. In addition, he obtained the Chartered Retirement Planning Counselor certification (CRPC®) and the Chartered Advisor in Philanthropy® designation (CAP™). He is currently working on his MBA and holds a BS in business administration from Lander University in Greenville South Carolina.

Native to South Carolina, Rusty is passionate about helping his community and is involved in various Greenville non-profit organizations. He stands by the importance of investing not just in one's own future, but in society's as well.