

# Charleston Financial Advisors, LLC

4 North Atlantic Wharf  
Suite 200  
Charleston, SC 29401

## Diane H. Blackwelder Principal, Advisor, Chief Compliance Officer

### ADV Part 2B - BROCHURE SUPPLEMENT

February 21, 2024

#### Item 1: Cover Page

This brochure supplement provides information about Diane H. Blackwelder that supplements the Charleston Financial Advisors, LLC brochure. Her individual CRD number is CRD# **2246611**. Please contact Diane H. Blackwelder if the Firm brochure was not provided. Additional information about Diane H. Blackwelder is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

**Year of Birth:** 1970

## **Item 2 Education Background and Business Experience**

### **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)

### **Designations**

CFP®- Certified Financial Planner™ Certified Financial Planner™ (CFP®) and certification marks are financial planning credentials awarded by the Certified Financial Planner Board of Standards Inc. (CFP® Board) to individuals who meet its education, examination, work experience and ethics requirements. Eligible candidates must have at least a bachelor's degree (or its equivalent) in any discipline from an accredited college or university in order to obtain a CFP® certification. The candidate also must pass an examination, have three years of personal financial planning experience, and meet the CFP Board's ethical requirements. To maintain the certification, the CFP® Board requires individuals to complete 30 hours of continuing education every two years and renew an agreement to be bound by its Standards of Professional Conduct.

## **Item 3 Disciplinary Information**

Adviser has nothing to report under this section.

## **Item 4 Other Business Activities**

Adviser is not engaged in any business other than investment advisory services.

## **Item 5 Additional Compensation**

From time to time, employees may receive additional compensation for growth of firm revenue.

## **Item 6 Supervision**

Diane Blackwelder is the Chief Compliance Officer of Charleston Financial Advisors, LLC. Diane Blackwelder can be reached at (843) 722-3331.

Charleston Financial Advisors, LLC ("CFA") has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations

to Clients of CFA. Further, CFA is subject to regulatory oversight by various agencies. These agencies require registration by CFA and its Supervised Persons. As a registered entity, CFA is subject to examinations by regulators, which may be announced or unannounced. CFA is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

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## Myles B. Brandt Principal and Advisor

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This brochure supplement provides information about Myles B. Brandt that supplements the Charleston Financial Advisors, LLC brochure. His individual CRD number is CRD# **5637391**. Please contact Myles B. Brandt if the Firm brochure was not provided. Additional information about Myles B. Brandt is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

## **Item 2 Education Background and Business Experience**

### **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)

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## **Item 3 Disciplinary Information**

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## **Item 4 Other Business Activities**

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## Stuart M. Pyne Advisor

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**Name:** Stuart M. Pyne (b. 1994) **Title:** Advisor  
**Year of Birth:** 1994

## **Item 2 Education Background and Business Experience**

### **Education:**

Bachelor of Arts, Economics - Case Western Reserve University (2016)

### **Experience:**

Advisor, Charleston Financial Advisors, LLC (09/2023 to Present)

Onboarding Manager, XY Planning Network (09/2022-09/2023)

Client Services and Operations Specialist, Jamison Hanson, (04/2022-09/2022)

Associate Advisor, South Bay Financial Partners (08/2018-04/2022)

Registered Representative, Foresters Financial Services (05/2016 -07/2018)

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## William. C. Prewitt Advisor

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**Name:** William. C. Prewitt, M.S., CFP® (b. 1946) **Title:** Advisor  
**Year of Birth:** 1946

## **Item 2 Education Background and Business Experience**

### **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)

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