

Investment Management for Individuals and Institutions Since 1988

704.336.6818

509 Fenton Place
Charlotte, NC 28207



Personal

- Our unwavering commitment to truly understand our clients' unique needs allows us to forge lasting relationships that transcend dollars and figures.
- Our customized communication initiative provides each client with the precise information they require, in the format and frequency with which each is most comfortable.
- **Cookies** By treating our clients as true partners in our practice, our success becomes inextricably linked to their success. We work for our clients — and no one else.

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Straightforward

- Utilizing only individual stocks and bonds provides full transparency in our client portfolios, making it simple to understand what you own.
- Regular communication of the rationale behind portfolio changes, combined with as-needed access to our research committee members, increases our clients' clarity and confidence with our investment strategy.
- Common sense based portfolio reports comprised of detailed and easy to read information, make it easy to know where you stand.



Deliberate

- Our investment strategy is based upon long term economic outlook, rather than attempting to anticipate short term trends and market swings.
- Continual analysis of each market sector allows us to monitor your current holdings, while continuously searching for new opportunities.
- We focus on large domestic companies with growing revenues and strong balance sheets.
- As a nimble investment manager, our decisions are driven solely by client goals, rather than investor activity and trends.

Our Firm




Who We Are

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• A fee-only Registered Investment Adviser regulated by the SEC, Eastover Capital Management custodies its clients' assets through Fidelity Institutional Wealth Services.

- Eastover Capital Management's portfolio management philosophy combines equity strategies with high-quality bond allocations, designed to provide diversified, stable portfolios that minimize risk and emotion.

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Why Eastover

- Our primary focus is to establish and grow meaningful client relationships, striving always to promote and protect our clients' dreams.
- As a fee-only investment manager, we do not collect trading commissions, allowing transparent pricing, while minimizing cost, turnover and taxes whenever possible.
- With a customized approach to investment management we invest the time to learn each client's unique circumstances — from tax sensitivity to socially responsible investing to charitable objectives — insuring our clients investments align with their values.

Our Team



Will Mackey

Chief Executive Officer & Client Advisor

Will serves as Chief Executive Officer and Client Advisor for Eastover. Prior to joining Eastover, Will has served multiple national and regional firms in his 23 years in the investment industry. He started out as a Financial Advisor in 1992, and since then has held multiple leadership roles — including National Sales Manager and Director of Business Development — throughout his career. He received a bachelor's degree from the University of South Carolina.

Outside of Eastover, Will spends his time with his wife and three daughters and is an active member Forest Hill Church. He enjoys a friendly/competitive round of golf with his friends and cooking on his Big Green Egg.

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Donn Toney

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Co-Founder & Economic Advisor

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Donn cofounded Eastover in 1988. Prior to Eastover, he founded Interstate Asset Management, a subsidiary of Interstate Securities, now a part of Wells Fargo. Donn serves as our Economic Advisor and is a member of our Investment Policy Committee and brings over 45 years of industry experience to the table. He received a bachelor's degree from Indiana University and an MBA from the University of Hartford.

When he isn't working, he spends time with his wife of 50 years, Dottie; his two daughters; and five granddaughters — taking trips and watching or playing sports. Donn is also involved at his church and at the Charlotte City Club.

Contact Info (<https://s3-us-west-2.amazonaws.com/eastover/Donn%2BToney.vcf>)



David Morgan

Client Advisor

David joined Eastover in 2009 and brings over 25 years of experience in the investment, trust and private banking industries. As a Private Client Advisor he worked with high net worth clients in all facets of family wealth management and planning. David also is a member of our Investment Policy Committee. A Charlotte native, he graduated with a Bachelor's of Science from Appalachian State University.

He has been involved with the Mint Museum of Craft and Design, raising funds for the United Way and The Arts and Science Council and currently assists with Loaves and Fishes. He is President of the Park Crossing Recreation Club in South Charlotte and President of the Delta Zeta Chapter of Pi Kappa Phi Alumni Association.

Contact Info (<https://s3-us-west-2.amazonaws.com/eastover/David%2BMorgan.vcf>)



Justin M. Brooks

Portfolio Manager

Justin joined Eastover in March 2015. He handles all the trading, research, and portfolio management duties of the firm. Prior to Eastover, Justin supported the New York Institutional trading desk for Merrill Lynch. He received a bachelor's degree in Economics from Clemson University. Justin is a member of our Investment Policy Committee. He holds his Series 65 license and has passed level 1 of the CFA program.

When he isn't in the office, Justin spends time outdoors with his family and friends. He is always tackling new renovation projects on his 1940s home with his dog, Luna, who follows him everywhere.

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Anna Maria Jackson, CFP®

Office Manager

Anna serves as the Office Manager for Eastover. Since joining Eastover in 2013, she has completed the Financial Planner graduate course of study at Queens University, obtained the CERTIFIED FINANCIAL PLANNER™ marks from the CFP Board of Standards and holds a Series 65 license. Prior to joining Eastover, Anna was an Administrative Assistant at Cranfill, Sumner and Hartzog LLP. She received a bachelor's degree in Psychology and Public Health from the University of North Carolina Charlotte.

Outside of Eastover, Anna and her husband enjoy traveling and being involved in the Charlotte community. Anna is an active member of her church, St. Nektarios Greek Orthodox Church.

Contact Info (<https://s3-us-west-2.amazonaws.com/eastover/Anna%2BJackson.vcf>)



Jon Nee

Client Advisor

Jon joined Eastover in 2019 with thirty years of experience in the financial planning, investment, private banking and trust arenas. In Jon's various roles, he assisted affluent families to simplify all their financial priorities. Jon graduated with a Bachelor of Science degree from West Virginia Wesleyan College.

Jon has been a member of the Children's Theater of Charlotte Board as well as a member of the Charlotte Arts and Science Grant Board. During his free time, Jon devotes his time to his wife and the various activities that involve his son or daughter. He also enjoys playing a tennis match or a round of golf with his friends.

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Our Process



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• An approach that involves looking at the “global big picture” and then breaking those components down into finer detail.

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• Within these sectors, stocks of specific companies are further analyzed to determine a “short list”.

• Companies with a proven record of increasing dividends, growing revenues and strong financials are screened for eventual selection.

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Top-Down Investing



Bond Laddering

- For clients with fixed Income allocation needs, individual bonds are selected, utilizing a bond ladder strategy.
- Laddering involves the selection of bonds with different maturity dates, rather than one large bond with a single maturity date.
- Because of the staggered maturities, the strategy minimizes interest rate risk, while increasing liquidity.
- Evenly spaced maturity dates allow the proceeds from maturing bonds to be reinvested at regular intervals, providing important diversification.
- Bond ladders are customized to match the cash flow demands of individual clients.

Our Strategies



Equity Core

Our Equity Core strategy invests primarily in large, well-established domestic companies. We search for favorable value investment opportunities in companies with strong balance sheets and growing revenues. Stocks must pass our screening process using extensive fundamental and technical analysis.

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Equity Income

Our Equity Income strategy is designed to provide above-average dividend yield using high quality stocks. To be considered for this strategy, stocks must first pass the screening criteria for the Equity Core model. Only companies with a proven track record of increasing their annual dividends will be used in this strategy.



Equity Growth

Our Equity Growth strategy invests primarily in stocks that we believe offer opportunity for capital growth. The companies we seek are those with above-average-earnings growth that reinvest in expansion, acquisition, research, and development.

Resources

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With You

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