

**THE FIRM**

Arbor is an independent, privately owned investment management firm. For us, we provide tailored solutions for high-net-worth individuals, foundations and plan trustees. We strive to earn your trust with exceptional service and a commitment to do what is right.



**COLLABORATION**

As an Arbor client, your needs come first. Our relationship is a dynamic journey focused on achieving your goals.



You are unique and deserve individual focus. We deliver tailored solutions.

**PEOPLE**

Experienced. Credentialed. Committed to your success. Our pledge is personal service from dedicated professionals.

## ADVISORS



**Scott E. Cawood, CFA®, CFP®**  
Principal, CEO & CIO



**Scott D. Jones, CFP®**  
Principal & CFO





**William E. Hollan, III, CFP®**

Principal



**Erika L. Mielke, JD, CFP®**

Principal



## **OPERATIONS**



**Paige P. Birchfield**

Principal & COO



**April Y. Beason**

Principal & CCO





**Jenna J. Craver**  
Investment Services Associate



**Judy A. Ward**  
Office Administrator



**JAMES E. MARTIN**  
Founder and Rare Bird

James E. Martin (Jim) founded Arbor in 1998, served as President and Chief Executive Officer until 2015 and retired in December 2016 after 43 years in financial services. Active in the community, Jim has served as Chairman of: Arbor Acres Retirement Community, Audubon Society of North Carolina, Forsyth Country Club, Reynolda Rotary Club, Senior Services of Forsyth County, Southern Appalachian Highlands Conservancy, UNC School of the Arts Foundation, Winston-Salem State University Foundation and Wake Forest University MBA Alumni Council. Jim and Mary Allen remain active in the community after retirement, traveling and spending time with their children and grandchild.

Please review the **Important Disclosures** set forth in the last section of this web site.