BCS Wealth Management

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BCS Wealth Management is an independent financial planning firm. Our aim is to help you reach goals important to your financial wellbeing.

Latest Articles

NEWSLETT

June 25, 2019

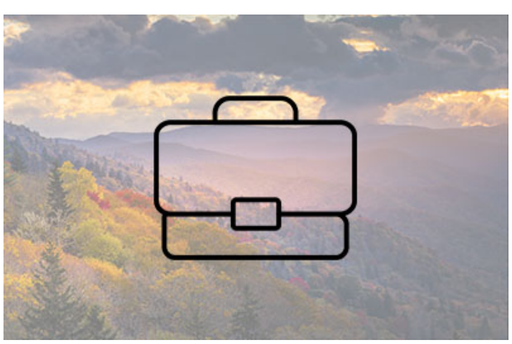
New Office Location & Open House

June 13, 2019

BCS Wealth Management Ranked in Accounting Today Magazine

Investments and Financial Planning

You appreciate the relationship between making wise financial decisions and fulfilling your dreams. We help you accomplish these things by building a relationship with you and getting to know your financial goals. Our philosophy is to advise what is in your best interest. We provide a variety of investment options to build a personalized portfolio, and we offer portfolio management with a long-term perspective.



Group Benefits and Business Services

A solid foundation of benefits helps attract and retain quality employees. We help businesses and non-profit organizations offer top quality benefits to their employees. We work with numerous reputable retireme
insurance companies to ensure you have the best possi
consultation, design, communication and management

corporate 529 plans, health insurance and short-term and long-term disability insurance.

Insurance

It is wise to be prepared for the unknown. Since insurance is an important aspect to a well-rounded financial plan, our services include providing life insurance, long-term care insurance and disability insurance.

Our Resources

Our resources allow us to approach your situation holistically to meet your needs, whether it be a personal financial plan with implementation, retirement planning assistance, an annual checkup, an insurance review or other objective. We have the capacity to offer fee-based, transactional and hourly management services.

We are confident that we have all the resources necessary to achieve your objective and/or to put a financial plan into place. Combined with our strategic partnership with Blackburn, Childers & Steagall, CPAs; Charles Schwab; and Purshe Kaplan Sterling Investments, BCS Wealth Management has the access, tools and professional oversight to help clients through all walks of life.

Nick Clay is a certified SmartVestor Pro (SVP). Through this program, Nick helps people in our region become financially stronger by educating them about smart financial decisions and building a long-term plan for their money. SmartVestors ensure a high standard of customer service. They truly care about clients reaching their financial goals.

Nick Clay BCSWM

Learn what it means to be a fiduciary

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Our Team

Nick A. Clay, CFP®, AIF®, AAMS®

Managing Partner & Senior Financial Advisor

Nick A. Clay, CFP®, AIF®, AAMS® has been a partner since January 2011. Nick is a CERTIFIED FINANCIAL PLANNER™ practitioner and holds the Accredited Asset Management Specialist℠ (AAMS®) designation, his Series 7, 66 and 99 securities licenses, and his Life, Accident, Health, Property and Casualty insurance Licenses.

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Nathan Goodwin, JD

Partner & Senior Financial Advisor

Nathan Goodwin, JD joined BCS Wealth as a Financial Advisor in January of 2013 and became a partner in January 2017. He is based in the Kingsport office but has clients throughout the region. Nathan is a licensed attorney and holds his Series 7 and 66 securities licenses, and his Life, Accident, Health insurance licenses.

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Myra O'Dell, CFP®

Partner & Senior Financial Advisor

Myra O'Dell, CFP® is a financial advisor with BCS Wealth Management. She started with the firm in 2004. Myra passed the CERTIFIED FINANCIAL PLANNER™ exam in 2005 and became a practitioner in 2007. Myra focuses include retirement planning and trust and estate work.

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Philip Bachman

Financial Advisor, Investment Management & Portfolio Research

Philip Bachman joined BCS Wealth Management as a financial advisor in 2015. Philip, also known as P.B., holds the Series 7 and Series 66 securities licenses. He works with individuals and families to provide a holistic approach to wealth management and investments.

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Paul Hoilman

Senior Insurance Advisor, Financial Advisor & Trust Operations

Paul joined BCS Wealth Management and First Covenant Trust & Advisors in March of 2016, and currently serves as head of the insurance and employee benefits division of BCS Wealth Management. He brings expertise in individual life, disability and long-term care insurance planning and analysis, as well as in structuring employee benefit plans for local businesses.

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Lauren Olander

Chief Compliance Officer, Trading & Operations

Lauren Olander is the Chief Compliance Officer and also works in operations at BCS Wealth Management. She started at BCS Wealth in 2014. Lauren holds a master's degree in family financial planning.

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Jeff Burgess

Financial Advisor

Jeff Burgess joined the BCS Wealth Management team in November 2018. Jeff has over 20 years of experience as a financial advisor. He previously worked with several teams in the banking industry. Jeff holds the Series 7, 66, and 26 securities licenses. He also holds Life and Health Insurance licenses.

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Kim Blankenstein

Office Administrator, Client Support & Operations

Kim Blankenstein is administrative assistant for BCS Wealth Management. She provides day-to-day support for the staff of BCS Wealth, as well as front desk responsibilities. She came to BCS Wealth Management with approximately 30 years of experience providing

Scott Hoilman

Insurance Advisor

Scott Hoilman graduated summa cum laude from East Tennessee State University with a Bachelor of Science Degree in Mathematics with a Statistics Concentration and a Minor in Economics. He was the sole recipient of the ETSU Department of Mathematics & Statistics Faculty Award in 2016-2017.

Bridget Millsap

Office Administrator, Client Support & Insurance Services

Bridget works at the front desk, providing client service and operational support. She has nearly 10 years of experience in administrative roles. Bridget also holds licenses for Property, Casualty and Life and Accident & Health insurance.

Carolyn Kerr

Administrative Assistant

Carolyn Kerr has joined BCS Wealth Management as an Administrative Assistant. Carolyn has been in Office Administration for over 30 years in the medical fiel
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administrative and operational support in the financial industry.

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Careers at BCS Wealth Management

We realize that a main component of our success is our team. As a part of our firm, you would experience challenging work in a friendly atmosphere. We offer competitive salaries and excellent benefits. If you are interested in joining our team, please email Nick Clay.

Email Nick Clay