

Financial Planning

CPM is dedicated to meet the needs of our members for investment services and financial planning when they need more than the federally insured deposit products of CPM. To meet this need CPM has selected agents Billy Evans and Zak Dearing who are Registered Representative of LPL Financial. They are available to meet with members in select CPM branches throughout the State from the Coast to the Upstate. By offering expanded services, like investment and financial planning, available in our branches, CPM enhances our vision and commitment to help our members improve their financial well-being and quality of life.

Let Billy and Zak help you plan for the future and pursue your financial goals. They offer the following services:

- Wealth Management
- Financial Planning
- Investment Portfolio Review
- Trusts and Estate Planning
- Retirement Planning
- Brokerage Services
- Equity and Fixed Income Investments
- Mutual Fund Review & Analysis
- College Savings
- Insurance Planning
- Implementation of Retirement
- Plans for Small Businesses

Ready to get started? Email us at w.evans@lpl.com or call 803.834.3499 to schedule an appointment. For your convenience, we have offices in the following branches:

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North Charleston, 5600 Virginia Avenue
Summerville, 165 Brighton Park Blvd.
Park Circle, 1066 E. Montague Avenue
Beaufort, 3482 Trask Parkway
Port Royal, 100 Midtown Dr.
Bluffton, 95 Buckwalter Place BLVD

Orangeburg, 1174 Boulevard St. NE
Greenville at Butler Road, 1270 East Butler Rd.
Greenville at Augusta, 1111 Augusta St
Greer, 1445 Hwy 101 South
Simpsonville, 307 Harrison Bridge Rd.
Spartanburg, 240 East Blackstock Rd.

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1. Representatives of a broker-dealer ("BD") or investment advisor ("IA") may only conduct business in a state if the representatives and the BD or IA they represent (a) satisfy the qualification requirements of, and are approved to do business by, the state; or (b) are excluded or exempted from the state's licensure requirements.
2. Representatives of a BD or IA are deemed to conduct business in a state to the extent that they provide individualized responses to investor inquiries that involve (a) effecting, or attempting to effect, transactions in securities; or (b) rendering personalized investment advice for compensation.