

alphavest

Alphavest  
Advisory Board

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The Alphavest Advisory Board offers our esteemed clients a unique and valued perspective on the effectiveness and impact of the many facets of Alphavest and Perfect Day Enterprises:

- Investments
- Planning
- Business Consulting

Our Advisory Board members are made up of clients and non-clients alike – businesspeople, entrepreneurs, and local leaders – allowing us to gain perspective and feedback on how we can continually grow in our desire to better serve our clients. Our Advisory members are diverse, yet they have one very important thing in common –

**They are people who believe in our mission to financially empower and serve others.**

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## **Welcome to our Market Kick Off for 2024!**

This journey inspires me to dedicate myself to the future of “deep work,” continuing to expose the offenses of the investment industry while providing a service that we can all stand behind. It renews my Perfect Day intentions and encourages me to strive deeper and more tenaciously to serve you and my clients’ needs better.

At our core we believe in a net-value to our clients and our Board. This means we give more than we receive – we’re committed to offering industry resources, planning, strategic advice, superior risk-adjusted investment performance and hopefully, financial peace of mind that comes from knowing you’re in the right place and doing what’s essential for a better today and tomorrow.

**It’s our commitment to Courageous Leadership in 2024!**



*Cokie inspires investors and entrepreneurs at-large with her vision and storytelling of her many experiences leading clients through the financial and work-life-balance maze.*

## Cokie Cox, CFP

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Cokie Cox has been in financial services and serving the needs of individual and institutional clients and entrepreneurs since 1996. She has a degree in Financial Management and Accounting from Clemson University and is a mother, author, business owner, financial “samurai” and Perfect Day engineer.

Cokie is the author of two books, and the founder of a non-profit; She CLIMBS. An avid mountaineer, she’s currently scaling the seven summits of the world; Cokie has already conquered Mount Elbrus in Russia, Mount Kilimanjaro in Africa, Mount Aconcagua in Argentina, Mount Denali in Alaska, and Mount Everest in Nepal.

Cokie is right-sizing Wall Street one client at a time and inspires investors and entrepreneurs at-large with her vision and storytelling of her many experiences leading clients through the financial and work-life-balance maze. Cokie loves farm life in Awendaw, SC with her two girls, husband, Tim and their many dogs and goats.



*Elizabeth brings over 25 years of institutional investment management experience to Alphavest.*

## Elizabeth Breaden, CIO, Alphavest

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Elizabeth Breaden serves as Chief Investment Officer for Alphavest. She brings over 25 years of institutional investment management experience to Alphavest's investment decision making and governance framework, to support investment performance and client outcomes. Elizabeth has held senior investment roles with SEI's Institutional Outsourced CIO group, New York Life Investments, and Natixis Investment Managers. She began her career as a short duration fixed income portfolio manager with UBS Asset Management in Chicago. She holds a BA from Northwestern University and an MBA in Finance from Northwestern University's Kellogg School of Management.

Elizabeth also brings significant international investment experience having been based in Europe for 14 years. She is passionate about bilingual education and is fluent in French. She currently resides in Chicago and has three children ages 17-26.



*Polly brings to Alphavest her skills in negotiation, budgeting, customer service, sales, and contractors.*

## **Polly Epstein, MSW, Entrepreneur/Sales Director** **Home Franchise Concepts**

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Polly Epstein graduated from College of Charleston with a focus on psychology to become an experienced sales director with a demonstrated history of working in the construction industry. An experienced Sales Director at Home Franchise Concepts, Polly has a extensive history of working in the construction industry. Former co-owner and operating manager of Tailored Living – a local Charleston area custom closet and innovative storage solution company, she was awarded Rookie of the Year at the Home Franchise Concepts International Convention in Orlando, FL.

After creating a successful birdhouse-making business, Polly co-founded Daniel Island Woodworks. The shop specializes in custom cabinetry for the commercial market with an annual gross of \$1.2 million and operates out of a 12,000-sq.-ft. facility where Polly oversaw general management and project operations. She brings to Alphavest her skills in negotiation, budgeting, customer service, sales, and contractors, as well as first-hand perspective as an Alphavest client and an active referral source.



*Heidi brings to Alphavest her talent for sales, coaching, team building, management, and networking.*

## Heidi Finniff, Banker, First Capital Bank

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Heidi Finniff spent time as a labor and community organizer after graduating with a philosophy major, and with her insight she began to see the need of supporting economic and educational development in marginalized communities. She started a career in banking in 2005 in order to help provide financial opportunities and literacy education to clients.

After spending over 10 years working in banking and economic development in Ohio, she relocated to Charleston in 2016 to be closer to family. Heidi concentrates on working with business owners as a commercial banker with First Capital Bank, experienced in and with a demonstrated history of success in the financial services industry, she brings to Alphavest her talent for sales, coaching, team building, management, and networking.



*Ann has helped numerous Alphavest clients over the years, as they navigate insurance renewals and evaluate current coverages or voids in coverage.*

## **Ann Kimball Gustafson, Property & Casualty Insurance** **Southeastern Insurance Services**

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Ann Kimball grew up in Charleston and graduated from Clemson University with a degree in business management. She began her career as an insurance producer for State Farm with a focus on new business sales and account management service. After three years with State Farm, Ann Kimball went to work as an Insurance advisor for PURE Insurance as it launched into the state of South Carolina. During her thirteen years at PURE, she focused on providing consultative risk management advice for homeowners of high valued residences throughout the country. Currently, Ann Kimball is a successful Private Client/ Personal Lines Team Leader with Southeastern Insurance Solutions. She also is a Certified Insurance Counselor.

Ann Kimball has helped Cokie personally, as well as numerous Alphavest clients over the years, as they navigate insurance renewals and evaluate current coverages or voids in coverage. Often times she advises clients to stay put with existing coverage, offering confidence and peace that they're in the right place and not under-insured or paying too much.

### **Alphavest Advisor Spotlight: Ann Kimball Gustafson**





*Steve offers Alphavest a fresh and innovative perspective on retail, manufacturing and importing.*

## Steve Lesniak

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Steve Lesniak arrived in Charleston from England in 1992 and, upon realizing that there was a gap in the market among the antique malls and Southern furniture stores for a more European shop, he opened Celadon Home Inc, an innovative, eclectic home-furnishings business in Mount Pleasant.

Born out of his vision to bring something fresh and non-traditional with a global point of view to Charleston's home furnishings & accessories market, Celadon's selection is a reflection of the sailing, and motorcycle-enthusiast himself: free-spirited, adventurous, and worldly. Steve offers Alphavest a fresh and innovative perspective on retail, manufacturing and importing.



*Marianne brings to Alphavest her passion for communication and leadership, as well as her dedication to process improvement and finding value in everyone.*

**Marianne Martin**, Senior Director of Project Management for Global Clinical Analytics for Caidya CRO

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Marianne Martin has over 20 years of management experience, ranging from the restaurant industry to the pharmaceutical industry. She started in the Food & Beverage industry as a teenager and her passion for customer service has landed her into project management for Clinical Research Organizations (CROs), managing clinical trials for pharmaceutical companies. She is now the Senior Director of Project Management for Global Clinical Analytics for Caidya CRO.

Marianne brings to Alphavest her passion for communication and leadership, as well as her dedication to process improvement and finding value in everyone.



*Leigh brings to Alphavest her extensive talent in raising capital, her super-human skill of managing and knowing people, marketing expertise and strategic networking, and client perspective.*

## Leigh Sherman, Retired/MUSC Development

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Leigh Sherman recently retired as the executive director of development for the Medical University of South Carolina. A graduate of College of Charleston, she began her career in health care-related philanthropy by serving as regional director of development for the American Heart Association. She directed grassroots fundraising efforts for 13 counties throughout lower South Carolina and later served as associate director of marketing for Trident Regional Health System in North Charleston.

In 1993 Leigh joined the MUSC Hollings Cancer Center, where she served as associate director and later director of development. She became executive director of the Medical University's Development Office in 1998, where she led a team of development professionals and provided strategic oversight in raising private funds for a broad range of academic, patient-care and research enterprises. Leigh brings to Alphavest her extensive talent in raising capital, her super-human skill of managing and knowing people, marketing expertise and strategic networking, and client perspective. She is an active referral source and ensuring Alphavest mitigates "missed opportunities" in an effort to meet and exceed clients needs are among Leigh's value to the Board.



*Judith brings Alphavest her skills of simplifying processes in order to be mindful of people's time, enabling organizations the flexibility to request support for what their needs truly are.*

## Judith Ranger Smith, Executive Director, Singing for Change

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Judith Ranger Smith is an experienced Executive Director with a demonstrated history of work in the philanthropy industry. Skilled in social enterprise, corporate social responsibility, grassroots organizing, coalition building, and international relations, she is a business development professional with a focus in nonprofit administration.

Judith's path to philanthropic work began when she was working as an administrative assistant and had a realization that she wanted to be doing more to be of service in the world. On a leap of faith, she quit her job and struck out on a new path, which led her from Atlanta to work with the Hands On network, to Seattle where she worked at a residential treatment center to help abused children, and finally to Key West where she met a woman named Sunshine Smith who offered her an opportunity with Jimmy Buffett's Margaritaville retail shop. With Judith's experience in the nonprofit sector and the guidelines that she helped to establish, along with the board members, Singing for Change was launched. Judith brings to Alphavest her skills of simplifying processes in order to be mindful of people's time, enabling organizations the flexibility to request support for what their needs truly are. A Perfect Day devotee, Judith understands the intersection of Perfect Day and Alphavest and is a valuable source of client feedback in both arenas.



*Gavin brings Alphavest his vast legal and real estate expertise and his commitment to providing efficient legal solutions to clients within the finance industry.*

### Gavin Wait, Attorney, Polsinelli

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Gavin Wait is a member of Polsinelli's Real Estate Finance practice, where he focuses on representing lenders and borrowers in a wide array of real estate financing.

Gavin excels at finding solutions to complex problems, whether strategic, technical or relational. His ultimate goal is to manage engagements and handle complex agreements to ensure successful operation and growth.

Gavin brings Alphavest his vast legal and real estate expertise and his commitment to providing efficient legal solutions to clients within the finance industry.



**Vice President, Operations  
Charleston Regional Development  
Alliance**

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## **Karen Kuchenbecker**

In her role with the CRDA, Karen works to align the organization's strategic priorities with its human and financial resources. On staff for more than 20 years, she also uses her "institutional memory" to provide insight and context for moving the organization forward.

Karen's previous experience includes directing both business-to-business and consumer accounts for communications firms in North Carolina and Charleston, plus serving as regional marketing manager for a national service firm. She holds a journalism degree from the University of North Carolina at Chapel Hill and professional certification from the Society for Human Resource Management (SHRM).

A native of the Chicago area, Karen has also lived in the California Bay Area, western Massachusetts and western North Carolina. She and her husband, Todd, now reside on James Island.



## Owner – Retired Restaurant Operations and Ownership

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### David Marconi

A restaurant industry professional for over 40 years including 24 in Charleston as Director of Operations and Shareholder of Maverick Southern Kitchens, a restaurant and hospitality company located in Charleston, SC. A founding member of the company along with Dick Elliott and Frank Lee in 1993, I served as opening general manager for each Maverick restaurant while maintaining an active role in community organizations.

A native of Connecticut, I was a veteran of restaurants in my home state as well as in Boston, Nantucket and Washington, D.C. Along the way, I was fortunate to gain valuable expertise in food and beverage operations, most notably as manager of two restaurants with nationally-known chef and James Beard Award winner Bob Kinhead. I remain a loyal devotee of the downtown business community and restaurant industry. As a past member of the advisory committees for the Culinary Institute of Charleston at Trident Tech and the Art Institute, and member of the board of directors of the Charleston and South Carolina Restaurant Associations, I remain a strong supporter of the restaurant industry and of those who make it one of the largest employers in our region.

It is a privilege to be the current Past Chairman of the Board for CHSW+F and work with such a creative and passionate group of professionals. My wife Ann and I reside in the historic district of Charleston. Retirement has led us to enjoy traveling half the year and the many charms and beauty of Charleston and the local arts, sports and restaurant activities in our area.





**Owner, Managing Director  
Supporting Strategies**

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## **Brad Strickland**

Brad is the owner and Managing Director of Supporting Strategies – Coastal SC, a bookkeeping and accounting company. For the past seven years, they have been delivering their services virtually to lower middle market companies in the greater Charleston.

Brad has worked in accounting and financial services for over 20 years. Most of his career has been in Corporate Lending with companies including GE Capital, Bank of America and FGI Finance. Ten of those years were spent in business development roles in the southeast where he has built a strong network of referral relationships with Business Owners, CPAs, Lawyers, Bankers and other Corporate Advisors to deliver financial solutions to growing businesses. He has worked mostly with lower middle market companies covering a wide array of industries and is familiar with the common accounting, financial, operational and cash flow needs of these businesses.

Brad holds an M.B.A in Finance and International Management from The Stern School of Business at New York University and a B.S. in Finance from Boston College. Brad is a member of the Charleston CFO Counsel and outside of work, he volunteers his accounting knowledge on behalf of The Cooper School and coaches youth soccer for the Charleston Recreational Department.





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