

LAUREL



The Heart of the Highlands-Cashiers Plateau

**Fidelis
Capital**

Resident Herb
Achey Opens
Cashiers Office

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Textiles and Landscapes

Cover Artist, Michelle Radford

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Herb Achey Brings Customized Wealth Management to Cashiers



Herb Achey
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Head of Wealth Planning



Matt Ellis
Client Advisor



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Investment Specialist



Chris Gunster, CFA
Head of Fixed Income

Resident Herb Achey opens Cashiers office for Fidelis Capital, a wealth management firm integrating asset management, wealth planning and family office services.

After wrapping up a distinguished 30-year career at Bank of America Private Bank in April, Cashiers resident Herb Achey wasn't calling it quits. He had a vision.

He envisioned a firm where he could more deeply serve the unique needs of families he has known for decades, successful business owners, and local residents receiving cookie-cutter guidance from their existing advisors.

A few calls with former colleagues led him to Fidelis Capital, a wealth management firm dedicated to the complex investment and planning needs of select individuals, families, and family offices.

Founded by former private bankers from Wells Fargo and Bank of America, Fidelis Capital has \$3 billion in assets and is composed of industry veterans with more than 500 years of combined experience serving

this clientele.

"Fidelis is really on the cutting edge of what modern wealth management for generationally wealthy families and institutions should look like – there's continuous improvement and truly the highest level of acumen around wealth planning I've seen," said Achey. "Nothing is cookie cutter or one-size-fits-all."

As residents for the past 25 years, Achey and his wife Rose Mary have become tightly woven into the fabric of the Cashiers community. Over the years, his line of work naturally led to conversations with locals about how their wealth is being managed.

"There is a real gap between how these families are being served by their advisors and how I know they should be served," said Achey. "What surprised me was just how many people are being underserved and have no idea."

Achey joins former colleagues and industry-leading talent at Fidelis to bring a tailored, comprehensive wealth management team to Cashiers. From his perspective, it would be "impossible" to build a family office with this caliber of talent – and integrity – on your own.

"I raised my kids on the idea of moral courage: Doing the right thing when no one's watching and being 'consistently good, not occasionally great,'" said Achey. "There's no room for occasionally great in this business. That's the kind of moral courage and consistent delivery I saw at Fidelis – it's why I joined."

To learn more about how Fidelis Capital coordinates, clarifies and simplifies financial affairs to further your legacy, please visit fideliscapital.com.



Your legacy is our mission.



Find out how we can help: info@fideliscapital.com

Advisory services offered through Fidelis Capital Partners, LLC., an Investment Adviser registered with the U.S. Securities & Exchange Commission. Please refer to our ADV brochure found at <https://adviserinfo.sec.gov/> for a complete description of fees and services offered.