



## Brochure Supplement - Form ADV Part 2B

### Investment Advisor Representatives:

#### *Investment Advisory*

- ▶ Brian L. Disher, CFP®, Director of Wealth Management
- ▶ Melissa D. Bane, CPA, PFS®, CFP®, ChFC, Senior Private Client Advisor
- ▶ John W. Cooper, CFP®, Private Client Advisor
- ▶ William M. Coxe, Jr., Private Client Advisor
- ▶ Quintin Pile, CFP®, Private Client Advisor

#### *Investment Management*

- ▶ Walter B. Todd III, President/Chief Investment Officer
- ▶ John D. Wiseman, Director of Fixed Income
- ▶ John R. Decker, CFA, Director of Equity
- ▶ David A. Halloran, CFA, Investment Consultant
- ▶ Claud William "Will" Bond, IV, Senior Trading Manager
- ▶ John W. McAlhany, Ph.D., Economist

Mailing Address:  
Post Office Box 3181  
Greenwood, SC 29648

Greenwood Office:  
425 Main St.  
Suite 100  
Greenwood, SC 29646

Greenville Office:  
201 W. McBee Ave.  
Suite 300  
Greenville, SC 29601

Website:  
greenwoodcapital.com

Telephone:  
(864) 941-4049

Email:  
info@greenwoodcapital.com

This brochure supplement provides information about the above-listed investment adviser representatives that supplements Greenwood Capital Associates, LLC's disclosure brochure. You should have received a copy of that brochure. Please contact Denise Lollis, Chief Compliance Officer, if you did not receive Greenwood Capital Associates' brochure or if you have any questions about the contents of this supplement. Additional information about our investment adviser representatives is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

*Registration does not imply a certain level of skill or training.*

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## David A. Halloran, CFA®

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### *Item 2: Educational Background and Business Experience*

CRD (Central Registration Depository) Number: 1455336

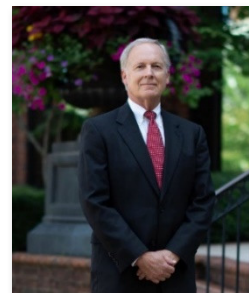
Year of Birth: 1960

#### Formal Education:

- ▶ Princeton University, BA – Economics, 1982
- ▶ Marymount University, MBA, 1987

#### Business Background:

- ▶ Investment Consultant, January 2021 to Present
- ▶ Chief Portfolio Strategist, Greenwood Capital, May 2009 to December 2020



#### Professional Designation(s):

The **Chartered Financial Analyst** designation, or CFA charter, has become a respected and recognized investment credential. To earn a CFA charter, you must have four years of qualified investment work experience, become a member of the CFA Institute, pledge to adhere to their Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in a six-hour exam. Completing the program takes most candidates between two and five years (there is no limit to the number of times you can take each exam), but you can take as long as you need to complete the program.

### *Item 3: Disciplinary Information*

Mr. Halloran has not been the subject of any material legal or disciplinary event.

### *Item 4: Other Business Activities*

Mr. Halloran is not engaged in any business activities other than those related to Greenwood Capital.

### *Item 5: Additional Compensation*

Mr. Halloran is eligible to receive a percentage of the first year advisory fee paid to us by new clients acquired as a result of his direct or indirect efforts as an incentive to bring new business under our management.

### *Item 6: Supervision*

Mr. Halloran is supervised by Denise H. Lollis, Chief Operating Officer and Chief Compliance Officer. Mrs. Lollis can be reached at (864) 941-4049. Mr. Halloran is supervised by requiring that he adhere to our Policies and Procedures and Code of Ethics. Greenwood Capital monitors the advice that Dr. McAlhany provides to clients by performing the following reviews:

- ▶ A daily review of account transactions
- ▶ A review of custodial information on a quarterly basis to assess account activity
- ▶ A review of client correspondence on an as needed basis