

# Brochure Supplement

JULY 13, 2020

## Robert T. Coleman, IV

10 Toy Street, Suite 200  
Greenville, SC 29601

(864) 720-2000

This Brochure Supplement provides information about Robert T. Coleman that supplements the Disclosure Brochure of Foster Victor Wealth Advisors, LLC (hereinafter "Foster Victor Wealth Advisors"), a copy of which you should have received. Please contact Foster Victor Wealth Advisors' Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Robert T. Coleman is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Foster Victor Wealth Advisors, LLC, a Registered Investment Adviser**

10 Toy Street, Suite 200, Greenville, SC 29601 | (864) 720-2000  
[www.fostervictorwa.com](http://www.fostervictorwa.com)

## Item 2. Educational Background and Business Experience

Born 1989

### Post-Secondary Education

Presbyterian College | B.S., Business Administration | 2011

### Recent Business Background

Foster Victor Wealth Advisors, LLC | Wealth Coach | October 2016 – Present

Northwestern Mutual Investment Services, LLC | Registered Representative | May 2011 – September 2016

### Professional Designations

Robert T. Coleman holds the professional designations of CERTIFIED FINANCIAL PLANNER™ (“CFP®”), CHARTERED LIFE UNDERWRITER (“CLU®”) and Certified Investment Management Analyst (CIMA).

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. (the “CFP Board”) to individuals who meet its education, examination, experience and ethics requirements. Eligible candidates are generally required to have three years of financial planning related experience and possess a bachelor’s degree from an accredited U.S. college or university. Certificants are further required to complete a CFP Board-Registered Education Program (or possess a qualifying professional credential), clear a personal and professional background check, and pass the CFP® Certification Examination, a ten-hour multiple choice exam divided into three separate sessions. In order to maintain the certification, CFP® designees must also complete at least 30 hours of continuing education every two years on an ongoing basis.

The CLU® designation is an insurance credential awarded by the American College to individuals who meet its educational, work experience and ethical requirements. Recipients of the CLU® designation have completed five required college-level core courses and three electives, covering all aspects of insurance planning, estate and retirement issues, taxation, business insurance and risk management. Recipients are further required to have three years of full-time business experience and must adhere to the American College Code of Ethics and Procedures. In order to maintain the designation, CLU® holders must satisfy the ongoing requirements of the PACE Recertification Program, which includes 30 hours of continuing education at least every two years.

The CIMA certification is an asset management credential administered through the Investment Management Consultants Association (“IMCA”) to individuals who meet its experience, ethical, education and examination requirements. Prerequisites for the CIMA designation include three years of financial services experience and an acceptable regulatory history. In order to obtain the CIMA certification, candidates must successfully complete a one-week classroom education program at an accredited

university business school and pass an online certification examination. CIMA designees are further required to adhere to the IMCA's Code of Professional Responsibility and Standards of Practice on an ongoing basis. CIMA designees must also report 40 hours of continuing education credits on a biannual basis in order to maintain the designation.

For additional information about this credentials, please refer directly to the website of the issuing organization.

### **Item 3. Disciplinary Information**

Foster Victor Wealth Advisors is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Robert T. Coleman. Foster Victor Wealth Advisors has no information to disclose in relation to this Item.

### **Item 4. Other Business Activities**

Foster Victor Wealth Advisors is required to disclose information regarding any investment-related business or occupation in which Robert T. Coleman is actively engaged.

#### **Licensed Insurance Agent**

Robert T. Coleman is a licensed insurance agent and in such capacity may recommend, on a fully-disclosed commission basis, the purchase of certain insurance products. A conflict of interest exists to the extent that Foster Victor Wealth Advisors recommends the purchase of insurance products where Robert T. Coleman receives insurance commissions or other additional compensation. Foster Victor Wealth Advisors seeks to ensure that all recommendations are made in the best interests of clients regardless of any additional compensation earned.

### **Item 5. Additional Compensation**

Foster Victor Wealth Advisors is required to disclose information regarding any arrangement under which Robert T. Coleman receives an economic benefit from someone other than a client for providing investment advisory services. In addition to his regular salary, Robert T. Coleman is entitled to receive a portion of investment advisory fees paid to Foster Victor Wealth Advisors by those clients in which he brings to the firm. In addition, Robert T. Coleman may receive a portion of insurance commissions earned by other Supervised Persons of the Firm related to clients' purchase of insurance products.

## Item 6. Supervision

Kylie K. Felker, Chief Compliance Officer and Chief Operations Officer, is generally responsible for supervising Robert T. Coleman's advisory activities on behalf of Foster Victor Wealth Advisors. Kylie K. Felker can be reached at the firm's main telephone number listed on the cover page of this Brochure Supplement.

Foster Victor Wealth Advisors supervises its personnel and the investments made in client accounts. Foster Victor Wealth Advisors monitors the investments recommended by Robert T. Coleman to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Foster Victor Wealth Advisors periodically reviews the advisory activities of Robert T. Coleman, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Robert T. Coleman.