

# Brochure Supplement

MARCH 22, 2023

## James Gordon Gulledge, III

10 Toy Street, Suite 200  
Greenville, SC 29601

(864) 720-2000

This Brochure Supplement provides information about James Gordon Gulledge, III 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 James Gordon Gulledge, III 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.fostervictor.com](http://www.fostervictor.com)

## Item 2. Educational Background and Business Experience

Born 1990

### Post-Secondary Education

Wolford College | Bachelor of Arts, Finance | 2012

### Recent Business Background

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

Northwestern Mutual Investment Services | Registered Representative | June 2013 – July 2016

Northwestern Mutual Life Insurance Company | Agent | November 2012 – July 2016

### Professional Designation

James Gordon Gulledge, III holds the professional designation of Chartered Financial Consultant (“ChFC®”).

The ChFC® designation is a financial planning credential awarded by the American College to individuals who satisfy its educational, work experience and ethics requirements. Recipients of the ChFC® certification have completed at least seven mandatory college-level courses in the areas of financial, insurance, retirement and/or estate planning, as well as income taxation and/or investments. Additionally, recipients have completed at least two elective courses on the financial system, estate planning applications, executive compensation, and/or retirement decisions. In order to maintain the designation, ChFC® holders must satisfy the ongoing requirements of the Professional Achievement in Continuing Education (“PACE”) Recertification Program, which includes 30 hours of continuing education at least every two years.

For additional information about this credential, 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 James Gordon Gulledge, III. 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 James Gordon Gulledge, III is actively engaged.

## **Licensed Insurance Agent**

James Gordon Gulledge, III 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 James Gordon Gulledge, III 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 James Gordon Gulledge, III receives an economic benefit from someone other than a client for providing investment advisory services. In addition to his regular salary, James Gordon Gulledge, III 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, James Gordon Gulledge, III 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, is generally responsible for supervising James Gordon Gulledge, III'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 James Gordon Gulledge, III 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 James Gordon Gulledge, III, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by James Gordon Gulledge, III.