

**NEW POLICY FOR RESTRICTED BROKERAGE
ACCOUNTS FOR CONSERVATORSHIPS IN RICHLAND COUNTY**

I have spoken with several judges and we are in consensus that a restricted brokerage account may conservatively invest in the following: CDs; Money Market account; Triple "A" rated municipal bonds; or US agency bonds; Government bond funds and large cap mutual funds invested primarily in S & P 500 companies.

Some Proposed Brokers/Brokerage Firms and Contacts are:

1. Wells Fargo Advisors, LLC 758-2929
Jay Pulliam
2. Ameriprise Financial 750-9337
Ryan Westmoreland 252-4344
Deborah Breedlove
3. BB&T Investments 800-453-7348
Sherry Stone
4. Wells Fargo Advisors, LLC 251-7121
Brian Szumilas
5. Anderson and Studwick 738-8100
Thomas Kepley
Gary Sharping
6. Merrill Lynch 733-2168
7. Morgan Stanley Dean Witter 251-3300
Ben Rast Jeryl Salmond
Chip Stanley
8. Nations Bank Investment, Inc 929-5620
A. Melvin Wright, III
9. Salomon Smith Barney 343-8800
Brian Frerichs
10. State Credit Union 343-0300
Larry Stewart
11. Waddell & Reed 798-5796 ext. 107
James M. Danford, III, CFP, CMFC
12. Certified Financial Planner practioners 933-9390
Joy J. Watkins, CFP 798-5796 ext. 107
James M. Danford, III, CFP, CMFC
13. Wells Fargo Advisors, LLC 758-2914
Thomas H. Grim
Glenn L. Meetze
14. OSTH Financial 788-2716
Omar Seda
15. Ameriprise Finaicial 255-7070
Linda W. Pittman, Service Coordinator
16. Wells Fargo Advisors, LLC

