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Dividend Assets Capital, LLC:
Making Moves in the Lowcountry
dacapitalsc.com/our-company/our-team

FOR IMMEDIATE RELEASE (January 15, 2021 - BLUFFTON, SC) – Dividend Assets Capital, LLC (DAC) announces promotions within the firm of several key leadership rolls including Susie Wang, Jim Haley, Bill Ford, Troy Livingston, and Jon Parrott.

- **Ying “Susie” Wang** has been promoted to **Chief Investment Officer**. Ms. Wang joined DAC in June 2008 as a Research Analyst responsible for stock selections across different sectors. From 2012-2016, she served as DAC’s Director of Equity Research, overseeing Dividend Growth Stocks and Master Limited Partnership (MLP) research. While serving as Director of Investment Strategies Ms. Wang was promoted to Co-CIO in April 2019 and is a member of both the Investment and Management Committees. A graduate of Georgia Southern University (MBA) and Swiss Management University (BBA), Wang earned the CFA® designation in 2012 and the CIC® designation in 2013, and speaks Chinese, English, and conversational French.
- **Jim Haley** has been promoted to **Managing Director, Private Client Group**. Mr. Haley joined the DAC team in March of 2017 with more than 20 years’ experience in the investment and wealth management industry. Mr. Haley earned his Master of Trust and Investment Management from Campbell University, a Bachelor of Science degree in Finance from Siena College and is a graduate of Southeastern Trust School. Additionally, Mr. Haley earned his Certified Financial Planner designation in 2014 and has held a diversity of business development positions such as Client Advisor, Portfolio Manager, and Wealth Planner within several banks including Bank of America-US Trust, BB&T and Wilmington Trust.
- **Bill Ford** has been promoted to **Managing Director, Institutional Asset Management Group**. Mr. Ford joined DAC in August 2019 as the Managing Director of Institutional Sales. Mr. Ford’s 20-year background in the financial services industry includes most recently serving as Vice President of strategic accounts for The Arboretum Group, an alternative investment firm specializing in private credit programs. He has also overseen and managed business development efforts for American Century Investments, Guardian Investor Services, MetLife, and Putnam Investments. Mr. Ford has a Bachelor’s degree with a concentration in business administration from the University of New Hampshire and is a Certified Financial Planner™ professional.
- **Troy Livingston** has been promoted to **Chief Financial Officer**. Mr. Livingston joined DAC in April 2011. He is currently responsible for the Firm’s financial results, cash forecasting/management, financial projections, IT planning, and maintenance and facilities management. Prior to joining DAC, Troy served on active duty with the United States Marine Corps for 20 years. He is a

graduate of Lipscomb University (BS) and serves his local community as a Deacon with Community Bible Church and as a coach with local youth sports.

- **Jon Parrott** has been promoted to **Chief Operations Officer**. Mr. Parrott joined DAC in March 2012 as the Operations Manager and was recently promoted to COO. He is responsible for overseeing daily, weekly, and monthly trading activities including allocations and reconciliations, performance requests and reporting, monitoring custodians, composite performance maintenance and reporting, GIPS reporting, system integrity, audits and controls, and overseeing DAC proxy voting. He also serves as chair of the Best Execution Committee. Prior to joining DAC, he was a Senior Operations Specialist with Thomson Reuters. Previous positions include Client Solutions Specialist with UMB Bank/JPMorgan Chase, Operations Analyst with Bank of America, and Auditor with State Street Bank. Mr. Parrott is a graduate of Saint Anselm College (BA) and Dale Carnegie Leadership Training.

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Dividend Assets Capital manages assets for private, institutional, and investment advisory clients who seek income and growth portfolio investment strategies. DAC is 100% employee-owned and is one of the largest investment managers in South Carolina, Learn more at DACapitalSC.com