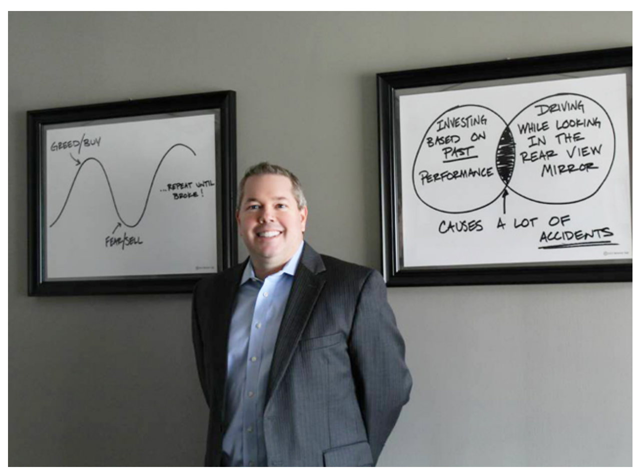
Kelly Weaver, CFP®

Kelly is a CERTIFIED FINANCIAL PLANNER™ practitioner and the Founder of Weaver Wealth Management, LLC, an investment management firm he formed in 2010 as an independent advisor with LPL Financial. Kelly joined LPL in 2009 after spending 11 years with Smith Barney as a Financial Advisor. Prior to that, Kelly moved to North Carolina in 1993 to begin his investment career with the regional brokerage firm of Interstate/Johnson Lane. Kelly has over 20 years of investment experience and holds his Series 7, 24, 31, 63, and 65 licenses in addition to his Insurance and Long Term Care licenses.

Kelly received his BA degree in Political Science from Temple University in 1992. He resides in Davidson with his wife Mary and their three boys, William, Taylor, and Charlie. Kelly enjoys cooking, golf and traveling with the family.

CERTIFIED FINANCIAL PLANNER™



Email:
kelly@weaverwealthnc.com

Phone:
(704) 940-0103

BrightScope

About Us Our Services Resources Client Login Contac

FIVE STAR PROFESSIONAL 2012 Wealth Manager

Kim Kaylor

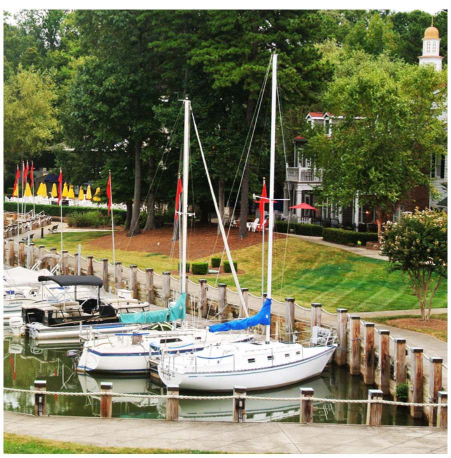
Kim brings more than 15 years of experience in the financial services industry to our o having previously worked for Morgan Stanley Smith Barney and its predecessors. She the FINRA Series 66 and 7 registrations. Kim received her education from the Univers North Carolina at Charlotte. Originally from Charlotte, Kim and her family live in Hunt NC. She can generally be found working on a do-it-yourself project around the house. I lover of animals and enjoys gardening. One of her biggest responsibilities at the office making sure that Kelly doesn't kill the plants!

Email: kim@weaverwealthnc.com

Phone: (704) 940-0103

Additional Team Members

Through our partnership with LPL Financial, we have access to many bright and well-credentialed experts in the fields of financial planning, estate planning, market research, insurance, a net worth specializations. Click the buttons below to learn more about our team of experts who can assist Weaver Wealth Management clients who may have needs in these areas.



Private Client Team

Financial Planning Group

Private Trust Company

Insurance Group

Building Solutions for Complex Cases

The Insurance Consulting Team partners with advisors to develop and implement strategies for affluent families an business owners looking to meet a variety of complex financial goals. Areas we have expertise in include:

- Estate planning
- B-Trust leverage
- Asset and income maximization
- Gifting strategies
- Buy-sell funding
- Executive bonus arrangements
- Key person
- Private Financing
- Split dollar plans
- Supplemental Retirement Plans
- Non-qualified deferred compensation

David P. Boekeloo, JD, MST, CFP®, CLU®, ChFC®

David Boekeloo has over 20 years experience providing advanced wealth and estate planning to high-net-worth clie and businesses. David has substantial experience in all aspects of life insurance, estate, charitable, business, retirem executive benefits and financial planning. David has a law degree, master's degree in taxation, is a Certified Financia Planner™ Practitioner, a Chartered Life Underwriter® and a Chartered Financial Consultant®.

Research Department

Contact Us

Email
kim@weaverwealthnc.com

Phone
Office: (704) 940-0103
Toll-Free: (855) 822-4702

Address
400 North Harbor Place Dr. | Suite E
Davidson, NC 28036

What We Do

Important Disclosures

The LPL Financial registered representatives associa this site may only discuss and/or transact business wi residents of the following states: AZ, CA, CO, FL, GA, MD, MI, MN, MO, NC, NJ, NM, NY, OH, OK, PA, SC, T VA, WI, WV. Securities and advisory services offered through LPL Financial, a Registered Investment Advis member: FINRA / SIPC.