

**Item 1 Cover Page for Brochure Supplement**

James Bryan Keith Ballentine, CFP<sup>®</sup>, CRPC<sup>®</sup>, President

Ballentine Capital Advisors, Inc.  
15 Halton Green Way  
Greenville, South Carolina 29607  
(864) 322-6046

February 16, 2021

**This brochure supplement provides information about James Bryan Keith Ballentine that supplements the Ballentine Capital Advisors, Inc. brochure. You should have received a copy of that brochure. Please contact James Bryan Keith Ballentine if you did not receive Ballentine Capital Advisors, Inc.'s brochure or if you have any questions about the contents of this supplement.**

**Additional information about James Bryan Keith Ballentine is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2 Educational Background and Business Experience

James Bryan Keith Ballentine, CFP<sup>®</sup>, CRPC<sup>®</sup>, born in 1973, received a Bachelor of Science degree in Business Administration from the University of South Carolina.

Mr. Ballentine is President of Ballentine Capital Advisors, Inc. (since 2006), President of Ballentine Capital Management, Inc. (since 2002), and a Registered Representative of Triad Advisors Inc. (since 2006). He is also a Member of BC Holdings, LLC (since 2004) and 2 AB Holdings LLC (since 2020).

The CERTIFIED FINANCIAL PLANNER<sup>™</sup>, CFP<sup>®</sup> and federally registered CFP (with flame design) marks (collectively, the “CFP<sup>®</sup> marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP<sup>®</sup> certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP<sup>®</sup> certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP<sup>®</sup> certification in the United States.

To attain the right to use the CFP<sup>®</sup> marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP<sup>®</sup> Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP<sup>®</sup> professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP<sup>®</sup> marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional*

*Conduct*, to maintain competence and keep up with developments in the financial planning field; and

- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

The College of Financial Planning® awards the CRPC® designation to applicants who complete the CRPC® professional education program, pass a final examination, commit to a code of ethics and agree to pursue continuing education. Continued use of the CRPC® designation is subject to ongoing renewal requirements. Every two (2) years the designee must renew their right to continue using the CRPC® designation by completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct.

### **Item 3 Disciplinary Information**

There are no legal or disciplinary events or proceedings to report concerning Mr. Ballentine.

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

James Bryan Keith Ballentine is also a Registered Representative with Triad Advisors, Inc., a FINRA registered broker-dealer. Clients that use BCA or Mr. Ballentine in a Registered Representative capacity will incur transactional costs in addition to the management fee for advisory services. Mr. Ballentine is also licensed and registered as an insurance agent to sell life, accident and other lines of insurance for various insurance companies and is President of an affiliated entity, Ballentine Capital Management, an insurance company. Therefore, he will be able to purchase insurance products for any client in need of such services and will receive separate, yet typical compensation in the form of commissions for the purchase of insurance products. These other activities create a conflict of interest because of the receipt of additional compensation by Mr. Ballentine for certain investment and insurance products. BCA and Mr. Ballentine address this conflict of interest by disclosing to clients prior to initiating any transactional related business that by utilizing him or BCA in these capacities, client will incur additional expenses. Those expenses are explained to the client in advance of offering these services.

Clients are not obligated to use BCA or Mr. Ballentine for these products. However, in such instances, there is no advisory fee associated with these investment and insurance products.

### **Item 5 Additional Compensation**

Mr. Ballentine, when acting as a registered representative of Triad, may receive selling compensation from such broker-dealer as a result of the facilitation of certain securities transactions on client's behalf through such broker-dealer.

Additionally, Mr. Ballentine, as a licensed insurance agent, may also receive selling compensation resulting from the sale of insurance products to clients of BCA.

### **Item 6 Supervision**

James Bryan Keith Ballentine, Chief Compliance Officer, monitors the investment advisory activities, personal investing activities, and adherence to the Advisor's compliance program and code of ethics of the BCA supervised persons on a continuous basis using various methods, including periodic inspection and review of client securities positions and transaction activity, obtaining certifications of compliance with company policies and procedures from those supervised, and obtaining and reviewing brokerage statements or transactions and holdings reports of the supervised persons. Mr. Ballentine can be reached at (864) 322-6046.

### **Item 7 Requirements for State-Registered Advisers**

Mr. Ballentine has not been involved in an award or found liable in an arbitration claim, civil, or self-regulatory organization event or administrative proceeding, or been the subject of a bankruptcy petition.

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Anthony R. Colancecco, Jr., CFP<sup>®</sup>, CRPC<sup>®</sup>, Chief Operating Officer

Ballentine Capital Advisors, Inc.  
15 Halton Green Way  
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**This brochure supplement provides information about Anthony R. Colancecco, Jr. that supplements the Ballentine Capital Advisors, Inc. brochure. You should have received a copy of that brochure. Please contact Anthony R. Colancecco, Jr. if you did not receive Ballentine Capital Advisors, Inc.'s brochure or if you have any questions about the contents of this supplement.**

**Additional information about Anthony R. Colancecco, Jr. is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2 Educational Background and Business Experience

Anthony R. Colancecco, Jr., CFP<sup>®</sup>, CRPC<sup>®</sup>, born in 1987, received a Bachelor of Science degree in Financial Services from Pennsylvania State University.

Mr. Colancecco is the Chief Operating Officer of Ballentine Capital Advisors, Inc. (since 2019). He is also a Member of 2 AB Holdings LLC (since 2020). Previously, Mr. Colancecco was Director of Advisor Services and Operations at Efficient Advisors, LLC (2017 – 2019), Director of Operations at Apexium Financial LP (2016 – 2017), and served in several operations roles at Efficient Advisors, LLC from 2010 to 2016.

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- Examination – Pass the comprehensive CFP<sup>®</sup> Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP<sup>®</sup> professionals.

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- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

The College of Financial Planning® awards the CRPC® designation to applicants who complete the CRPC® professional education program, pass a final examination, commit to a code of ethics and agree to pursue continuing education. Continued use of the CRPC® designation is subject to ongoing renewal requirements. Every two (2) years the designee must renew their right to continue using the CRPC® designation by completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct.

### **Item 3 Disciplinary Information**

There are no legal or disciplinary events or proceedings to report concerning Mr. Colancecco.

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

Mr. Colancecco is not actively engaged in any material investment-related or non-investment-related business or occupation outside of Ballentine Capital Advisors, Inc.

### **Item 5 Additional Compensation**

Mr. Colancecco does not receive compensation or other economic benefit from anyone who is not a client for providing advisory services.

### **Item 6 Supervision**

James Bryan Keith Ballentine, Chief Compliance Officer, monitors the investment advisory activities, personal investing activities, and adherence to the Advisor’s compliance program and code of ethics of the BCA supervised persons on a continuous basis using various methods, including periodic inspection and review of client securities positions and transaction activity, obtaining certifications of compliance with company policies and procedures from those supervised, and obtaining and reviewing brokerage statements or transactions and holdings reports of the supervised persons. Mr. Ballentine can be reached at (864) 322-6046.

### **Item 7 Requirements for State-Registered Advisers**

Mr. Colancecco has not been involved in an award or found liable in an arbitration claim, civil, or self-regulatory organization event or administrative proceeding, or been the subject of a bankruptcy petition.



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Cheryl Hayes, CFP<sup>®</sup>, CRPC<sup>®</sup>, Investment Advisor Representative

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**This brochure supplement provides information about Cheryl Hayes that supplements the Ballentine Capital Advisors, Inc. brochure. You should have received a copy of that brochure. Please contact Cheryl Hayes if you did not receive Ballentine Capital Advisors, Inc.'s brochure or if you have any questions about the contents of this supplement.**

**Additional information about Cheryl Hayes is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2 Educational Background and Business Experience

Cheryl Hayes, CFP<sup>®</sup>, CRPC<sup>®</sup>, born in 1957, received a Bachelor of Arts degree in Biology and Psychology from Erskine College.

Ms. Hayes is an Investment Advisor Representative of Ballentine Capital Advisors, Inc. (since 2012), an Advisor of Ballentine Capital Management, Inc. (since 2012), and a Registered Representative of Triad Advisors Inc. (since 2009). Previously, Ms. Hayes was Planning Coordinator for Ballentine Capital Advisors, Inc. (2008-20012), and Coordinator for Ballentine Capital Management, Inc. (2008-2012).

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- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP<sup>®</sup> professionals.

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- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

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### **Item 3 Disciplinary Information**

There are no legal or disciplinary events or proceedings to report concerning Ms. Hayes.

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

Cheryl Hayes is also a Registered Representative with Triad Advisors, Inc., a FINRA registered broker-dealer. Clients that use BCA or Ms. Hayes in a Registered Representative capacity will incur transactional costs in addition to the management fee for advisory services. Ms. Hayes is also licensed and registered as an insurance agent to sell life, accident and other lines of insurance for various insurance companies. Therefore, she will be able to purchase insurance products for any client in need of such services and will receive separate, yet typical compensation in the form of commissions for the purchase of insurance products. These other activities create a conflict of interest because of the receipt of additional compensation by Ms. Hayes for certain investment and insurance products. BCA and Ms. Hayes address this conflict of interest by disclosing to clients prior to initiating any transactional related business that by utilizing her or BCA in these capacities, client will incur additional expenses. Those expenses are explained to the client in advance of offering these services.

Clients are not obligated to use BCA or Ms. Hayes for these products. However, in such instances, there is no advisory fee associated with these investment and insurance products.

### **Item 5 Additional Compensation**

Ms. Hayes, when acting as a registered representative of Triad, may receive selling compensation from such broker-dealer as a result of the facilitation of certain securities transactions on client's behalf through such broker-dealer.

Additionally, Ms. Hayes, as a licensed insurance agent, may also receive selling compensation resulting from the sale of insurance products to clients of BCA.

### **Item 6 Supervision**

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### **Item 7 Requirements for State-Registered Advisers**

Ms. Hayes has not been involved in an award or found liable in an arbitration claim, civil, or self-regulatory organization event or administrative proceeding, or been the subject of a bankruptcy petition.