

***Cover Page***

**JAMES BRYAN KEITH BALLENTINE, CFP<sup>®</sup>, CRPC<sup>®</sup>, President**

**15 Halton Green Way  
Greenville, South Carolina 29607**

**Phone: (864) 322-6046**

March 13, 2023

**FORM ADV PART 2  
BROCHURE SUPPLEMENT**

**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 a Ballentine Capital Advisors, Inc.'s brochure or if you have questions about this supplement. Mr. Ballentine's CRD number is 3183968.**

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

***Educational Background and Business Experience***

James Bryan Keith Ballentine, CFP®, CRPC®  
President  
Year of Birth: 1973

**Business Background:**

Ballentine Capital Advisors, Inc., President, May 2006 - Present

Ballentine Capital Management, Inc., President, April 2002 - Present

Triad Advisors, Inc., Registered Representative, May 2006 – November 2021

**Educational Background:**

University of South Carolina, Bachelor of Science in Business Administration

RELEVANT DESIGNATIONS:

**CERTIFIED FINANCIAL PLANNER™ Practitioner (CFP®)**

This program is sponsored by the CFP Board of Standards. Before applying for the CFP® Certification Examination, you need to meet the six course education requirements (or their equivalent) as set by CFP Board as well as a financial plan development course registered with CFP Board. Additionally, a bachelor's degree (or higher), or its equivalent, in any discipline, from an accredited college or university is required to attain CFP® certification. Additional requirements include successful completion of the CFP® Certification Examination, which tests your ability to apply your financial planning knowledge to client situations. The 10-hour exam is divided into three separate sessions. Because of the integrated nature of financial planning, however, each session may cover all topic areas (personal financial planning, risk management, income taxes, investments, retirement planning, and estate planning). In addition to the education requirements, there is an experience requirement, which is currently at least three years of qualifying full-time work experience in personal financial planning. There are additional requirements for candidates and registrants to pass Fitness Standards and a Background Check and to agree to abide by CFP Board's Code of Ethics and Professional Responsibility, Rules of Conduct and Financial Planning Practice Standards. Certificants must continue to meet continuing education requirements which presently include obtaining 30 hours of continuing education in selected subjects every two

## CHARTERED RETIREMENT PLANNING COUNSELOR (CRPC®)

Chartered Retirement Planning Counselor (CRPC) is a professional financial planning designation awarded by the College for Financial Planning. Individuals may earn the CRPC designation by completing a study program and passing a final multiple-choice examination. The CRPC program is developed with a focus on client-centered problem solving. Applicants gain in-depth knowledge of individuals' needs both before and after retirement. The College for Financial Planning describes the program as helping financial planners and advisers define and create a "road map for retirement" for their clients. Successful applicants earn the right to use the CRPC designation with their names for two years, which can improve job opportunities, professional reputation and pay. Every two years, CRPC professionals must complete 16 hours of continuing education and pay a small fee to continue using the designation.

Form ADV, Part 2B, Item 3

### ***Disciplinary Information***

Mr. Ballentine does not have any reportable disciplinary disclosures.

Form ADV, Part 2B, Item 4

### ***Other Business Activities***

James Bryan Keith Ballentine has a financial industry affiliated business as an independent insurance agent. Not more than 30% of his time is spent on these activities. From time to time, he offers clients advice or products from those activities. He may receive separate yet typical compensation in the form of commissions for the sale of insurance products.

These practices represent a conflict of interest because it gives Mr. Ballentine an incentive to recommend products based on the commission amount received. This conflict is mitigated by the fact that Mr. Ballentine has a fiduciary responsibility to place the best interest of the client first and the clients are not required to purchase any products. Clients have the option to purchase these products through another insurance agent of their choosing.

Mr. Ballentine is also a Member of BC Holdings, LLC (since 2004) and 2 AB Holdings LLC (since 2020).

Form ADV, Part 2B, Item 5

### ***Additional Compensation***

James Bryan Keith Ballentine does not receive any economic benefit from anyone, who is not a client, for providing advisory services.

Form ADV, Part 2B, Item 6

***Supervision***

Ballentine Capital Advisors, Inc. has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the Securities and Exchange Commission Investment Advisers Act of 1940. Mr. Ballentine is an Investment Advisory Representative (“IAR”) of the firm and is supervised by Anthony Colancecco, Chief Compliance Officer. He can be reached at (864) 322-6046.

Form ADV, Part 2B, Item 7

***Requirements for State-Registered Advisers***

James Bryan Keith Ballentine does not have any reportable disciplinary events required to be disclosed in this section.

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**ANTHONY R. COLANCECCO, JR., CFP®, CRPC®, Chief Operating Officer**

**15 Halton Green Way  
Greenville, South Carolina 29607**

**Phone: (864) 322-6046**

March 13, 2023

**FORM ADV PART 2  
BROCHURE SUPPLEMENT**

**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 a Ballentine Capital Advisors, Inc.'s brochure or if you have questions about this supplement. Mr. Colancecco's CRD number is 6247436.**

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

***Educational Background and Business Experience***

Anthony R. Colancecco, Jr., CFP®, CRPC®  
Chief Operating Officer and CCO  
Year of Birth: 1987

**Business Background:**

Ballentine Capital Advisors, Inc., Chief Operating Officer and CCO, October 2019 - Present

Triad Advisors, LLC, Registered Representative, September 2019 – November 2021

Efficient Advisors, LLC, Director of Advisor Services and Operations, January 2017 – October 2019

Apexium Financial LP, Operations, October 2016 – April 2017

Efficient Advisors, LLC, Operations Manager, January 2010 – August 2016

**Educational Background:**

Pennsylvania State University, Bachelor of Science in Financial Services

**RELEVANT DESIGNATIONS:**

**CERTIFIED FINANCIAL PLANNER™ Practitioner (CFP®)**

This program is sponsored by the CFP Board of Standards. Before applying for the CFP® Certification Examination, you need to meet the six course education requirements (or their equivalent) as set by CFP Board as well as a financial plan development course registered with CFP Board. Additionally, a bachelor's degree (or higher), or its equivalent, in any discipline, from an accredited college or university is required to attain CFP® certification. Additional requirements include successful completion of the CFP® Certification Examination, which tests your ability to apply your financial planning knowledge to client situations. The 10-hour exam is divided into three separate sessions. Because of the integrated nature of financial planning, however, each session may cover all topic areas (personal financial planning, risk management, income taxes, investments, retirement planning, and estate planning). In addition to the education requirements, there is an experience requirement, which is currently at least three years of qualifying full-time work experience in personal financial planning. There are additional requirements for candidates and registrants to pass Fitness Standards and a Background Check and to agree to abide by CFP Board's Code of Ethics and Professional Responsibility, Rules of Conduct and Financial Planning Practice

Standards. Certificants must continue to meet continuing education requirements which presently include obtaining 30 hours of continuing education in selected subjects every two

#### CHARTERED RETIREMENT PLANNING COUNSELOR (CRPC®)

Chartered Retirement Planning Counselor (CRPC) is a professional financial planning designation awarded by the College for Financial Planning. Individuals may earn the CRPC designation by completing a study program and passing a final multiple-choice examination. The CRPC program is developed with a focus on client-centered problem solving. Applicants gain in-depth knowledge of individuals' needs both before and after retirement. The College for Financial Planning describes the program as helping financial planners and advisers define and create a "road map for retirement" for their clients. Successful applicants earn the right to use the CRPC designation with their names for two years, which can improve job opportunities, professional reputation and pay. Every two years, CRPC professionals must complete 16 hours of continuing education and pay a small fee to continue using the designation.

Form ADV, Part 2B, Item 3

#### ***Disciplinary Information***

Mr. Colancecco does not have any reportable disciplinary disclosures.

Form ADV, Part 2B, Item 4

#### ***Other Business Activities***

Anthony R. Colancecco, Jr. has a financial industry affiliated business as an independent insurance agent. Not more than 30% of his time is spent on these activities. From time to time, he offers clients advice or products from those activities. He may receive separate yet typical compensation in the form of commissions for the sale of insurance products.

These practices represent a conflict of interest because it gives Mr. Colancecco an incentive to recommend products based on the commission amount received. This conflict is mitigated by the fact that Mr. Colancecco has a fiduciary responsibility to place the best interest of the client first and the clients are not required to purchase any products. Clients have the option to purchase these products through another insurance agent of their choosing.

Mr. Colancecco is also a Member of 2 AB Holdings LLC (since 2020).

Form ADV, Part 2B, Item 5

***Additional Compensation***

Anthony R. Colancecco, Jr. does not receive any economic benefit from anyone, who is not a client, for providing advisory services.

Form ADV, Part 2B, Item 6

***Supervision***

Ballentine Capital Advisors, Inc. has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the Securities and Exchange Commission Investment Advisers Act of 1940. Anthony Colancecco, as the 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. He can be reached at (864) 322-6046.

Form ADV, Part 2B, Item 7

***Requirements for State-Registered Advisers***

Anthony R. Colancecco, Jr. does not have any reportable disciplinary events required to be disclosed in this section.



***Cover Page***

**ANNE J. THOMPSON, CRPC®**

**15 Halton Green Way  
Greenville, South Carolina 29607**

**Phone: (864) 322-6046**

March 22, 2023

**FORM ADV PART 2  
BROCHURE SUPPLEMENT**

**This brochure supplement provides information about Anne J. Thompson that supplements the Ballentine Capital Advisors, Inc. brochure. You should have received a copy of that brochure. Please contact Anne J. Thompson if you did not receive a Ballentine Capital Advisors, Inc.'s brochure or if you have questions about this supplement. Ms. Thompson's CRD number is 6496376.**

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

Form ADV, Part 2B, Item 2

***Educational Background and Business Experience***

Anne J. Thompson, CRPC®  
Wealth Advisor  
Year of Birth: 1971

**Business Background:**

Ballentine Capital Advisors, Inc., Wealth Advisor, March 2023 - Present

Charles Schwab & Co., Inc., Financial Consultant, May 2019 – March 2023

Bank of America, N.A., Financial Advisor, October 2015 – March 2019

Merrill Lynch, Pierce, Fenner & Smith, Inc., Financial Advisor, August 2015 – March 2019

**Educational Background:**

Western Carolina University, Bachelor of Science in Therapeutic Recreation, Graduated: 1993

**Relevant Designations:**

CHARTERED RETIREMENT PLANNING COUNSELOR (CRPC®)

Chartered Retirement Planning Counselor (CRPC) is a professional financial planning designation awarded by the College for Financial Planning. Individuals may earn the CRPC designation by completing a study program and passing a final multiple-choice examination. The CRPC program is developed with a focus on client-centered problem solving. Applicants gain in-depth knowledge of individuals' needs both before and after retirement. The College for Financial Planning describes the program as helping financial planners and advisers define and create a "road map for retirement" for their clients. Successful applicants earn the right to use the CRPC designation with their names for two years, which can improve job opportunities, professional reputation and pay. Every two years, CRPC professionals must complete 16 hours of continuing education and pay a small fee to continue using the designation.

Form ADV, Part 2B, Item 3

***Disciplinary Information***

Ms. Thompson does not have any reportable disciplinary disclosures.

Form ADV, Part 2B, Item 4

***Other Business Activities***

Anne J. Thompson is owner of a Computer/IT Services company. Ms. Thompson does not have any other outside business activities to report.

Form ADV, Part 2B, Item 5

***Additional Compensation***

Anne J. Thompson does not receive any economic benefit from anyone, who is not a client, for providing advisory services.

Form ADV, Part 2B, Item 6

***Supervision***

Ballentine Capital Advisors, Inc. has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the Securities and Exchange Commission Investment Advisers Act of 1940. Ms. Thompson is an Investment Advisory Representative (“IAR”) of the firm and is supervised by Anthony Colancecco, Chief Compliance Officer. He can be reached at (864) 322-6046.

Form ADV, Part 2B, Item 7

***Requirements for State-Registered Advisers***

Anne J. Thompson does not have any reportable disciplinary events required to be disclosed in this section.