

#### PERSONAL DETAILS

**Address:**

1441 Main Street  
Suite 700  
Columbia, SC 29201

**Phone:**

803.223.7001 (office)  
412.719.6631 (cell)

**Email:**

jbfoley@janney.com

#### WEALTH NEEDS TO BE MORE THAN MANAGED.

It needs to be developed, preserved, and when the time is right, passed along. Janney Montgomery Scott understands that wealth—like life—is more than just an event. It is an ongoing process of growth and development.

To take advantage of the opportunities life presents, you need a firm that has the knowledge—and the experience—to offer advice and recommend financial strategies for every stage of life.

## CYBERSC MEMBERS AND COLLEAGUES,

My name is Jimmy Foley and I recently joined CyberSC in the capacity of a Cybersecurity Affiliate. Currently, I work as a Financial Advisor with Janney Montgomery Scott, LLC here in Columbia, SC. Prior to that, I spent over 7 years in the United States Marine Corps as a Communications Officer. In this capacity, I had the great pleasure and fortune of serving as the lead planner for the employment of information technology and cybersecurity practices for the units I was attached to. This occupation led me to develop a profound respect and appreciation for the cyber industry.

Cybersecurity is a universal need that is everchanging and rapidly growing. Last year cybercrime cost victims over \$10 billion, up from \$6.9 billion the year prior, and \$4.2 billion the year before that. Our country, our communities, and our own homes need talented and readily available cybersecurity professionals now more than ever, which is exactly what drew me to become a member and take part in CyberSC. When I decided to depart Active Duty, I weighed a multitude of different career paths. I considered using my previous professional experience to pursue a civilian career as an IT or Cybersecurity professional but could not get past a desire to use this transition as an opportunity to try something different. Cybersecurity professionals and organizations usually work in support capacities of different industries and organizations that don't have an organic capability to secure their own footprint. Speaking from firsthand experience, sometimes this lack of understanding can translate to a lack of appreciation. I wanted to pursue a career that allowed me to support those that do the supporting.

In March of this year, I connected with CyberSC's founding director, Mr. Tom Scott. Tom and I had a great conversation where he agreed that there was a capability gap of resident wealth management expertise coupled with an understanding the cyber industry. Tom and I both agreed though, that before I joined and took a participating role in CyberSC, I needed to identify specific ways in which I could provide value and support. Below are the services we came up with:

- First, I would like to offer a free financial plan and assessment for any member of CyberSC, whether it be a business, employee of a member, or an individual member. Now more than ever, there is a large emphasis on the importance of having a well thought out financial plans at the heart of every financial decision that you make. When establishing the initial plan, most individuals can find the process overwhelming, especially when they realize how vast their financial profile truly is. Our process is designed to take the most complex situations and provide meaningful, easy-to-understand insight. We believe the processes we have in place are effective and beneficial, as evidenced by our client's feedback. AON conducted a clients insight survey in 2021, where 94% of our clients agreed that their financial plan was comprehensive and aligned with their long-term financial goals. Additionally, 93% of clients found the process was simple and straightforward.
- Second, there will be events hosted exclusively to members of the CyberSC organization. These events will be designed to be informative and social in nature, and free of cost for attendance for any member. At times these events may be hosted by industry partners of ours or simply a class on investments or current market conditions. Furthermore, we will periodically provide articles and input to Tom's newsletter with pertinent economic updates and insight that tailored to your specific industry.
- Third, taking an active role as participant and advocate. I stand ready to offer support, promote employment, and encourage the expansion of CyberSC and the cybersecurity community across the state.

I would like to conclude this introductory letter with sincere thanks to Tom and the CyberSC organization for letting us be a member of your outstanding organization. I hope that our participation excites you in the same way it does us. We look forward to what the future holds and are excited to take part of the growth of this crucial industry. Please do not hesitate to contact us if there is anything we can do to support you.

Sincerely,

**Jimmy Foley**

<sup>1</sup>Federal Bureau of Investigation Internet Crime Report-2022

<sup>2</sup>Statistics shown are from a Aon client insights survey that was conducted in 2021



## YOUR RELATIONSHIP WITH JANNEY

Depending on your financial needs and personal preferences, as well as the fees and costs associated with those services, you may opt to engage in a brokerage relationship, an advisory relationship or a combination of both. Each time you open an account, we will make recommendations on which type of relationship is in your best interest based on the information you provide when you complete or update your client profile.

If you engage in a brokerage relationship, you will buy and sell securities on a transaction basis and pay a commission for these services. My recommendations for the purchase and sale of securities will be based on what is in your best interest and reflect reasonably available alternatives at that time.

If you engage in an advisory relationship, you will pay an asset-based fee which encompasses, among other things, a defined investment strategy, ongoing review, and performance reporting. I will serve in a fiduciary capacity for your advisory relationships.

## ABOUT JANNEY MONTGOMERY SCOTT LLC

With roots tracing back to 1832, the Financial Advisors of Janney Montgomery Scott LLC have continued to build their reputation for providing timely service and knowledgeable financial consultation to individual and institutional clients.

Janney Montgomery Scott LLC is an integral part of the nation's financial history, having held the second oldest membership on the New York Stock Exchange. Through this unique perspective, we have seen our industry—and our clients—evolve. We have adapted to meet the challenges presented by change while adhering to the core principles of our founders—and our client commitment: service, trust and integrity. We rank as a top-tier, full-range firm, providing financial services, investment banking and municipal and public finance services. Our primary business, however, is helping individuals and their families grow, manage, protect and transfer their wealth.

Janney Montgomery Scott LLC is an independently operated affiliate of the Penn Mutual Life Insurance Company, which acquired the firm in 1982. Penn Mutual ranks as one of the largest mutual insurance companies in the nation.

Janney Montgomery Scott LLC is a member of the New York Stock Exchange, Financial Industry Regulatory Authority and the Securities Investor Protection Corporation.

### Financial Advice and Service to Individuals, Families, and Business Owners:

- Advisory Services
- Annuities
- Asset Management
  - Private Investment Management
  - Institutional Investment Management
- Brokerage Services
- Cash Management
- Certificates of Deposit
- College Savings Planning
- Corporate Executive Services
- Equity Selection
- Equity Syndicate
- Estate Planning
- Exchange-Traded Funds (ETFs)
- Financial Planning
- Fixed Income
- Income Planning
- Insurance
- Mutual Funds
- Research and Strategy
- Retirement Plans
  - Individual, Small Business & Corporate
- Trust Services
- Unit Investment Trusts
- Wealth Management

*For more information about Janney, please see Janney's Relationship Summary (Form CRS) on [www.janney.com/crs](http://www.janney.com/crs) which details all material facts about the scope and terms of our relationship with you and any potential conflicts of interest.*