

# Staff Bios



***RICHARD BERRY, CLU, ChFC, CLTC***  
PRESIDENT, BERRY FINANCIAL GROUP, INC.  
Investment Advisor Representative

Richard Berry has been assisting pre-retirees and retirees in the Pee Dee and the Grand Strand areas of North and South Carolina since 1987. Through his programs titled, "A Confident Financial Future," he has taught thousands of people how to protect and preserve their assets, increase their retirement income, and reduce their taxes.

Richard's home is in North Myrtle Beach, South Carolina. He is a member of Ocean View Baptist Church in Myrtle Beach. His firm, Berry Financial Group, is a member of The Dillon County, Myrtle Beach, and North Brunswick Chambers of Commerce. He earned a Bachelor's Degree from Francis Marion University and a Chartered Financial Consultant's Degree (ChFC) as well as a Chartered Life Underwriter's Degree (CLU) from The American College. He also earned his Certified Long Term Care (CLTC) designation to better help his clients prepare for the possibility of one day facing an extended illness or frailty. He was nominated as 2007 Advisor of the Year by Senior Market Advisor (SMA) magazine and is a leading mentor to other financial advisors nationwide. In 2014, Richard was honored as a recipient of the Noble Achievement Award by American Equity for his exemplary service in the financial services industry. Upon receiving this award, Richard replied, "I received this award not because of my greatness but because of the great God I serve."

He attributes his success to relationships, teamwork, focus, and passion. He has three office locations and 18 Berry Financial Group team members to better serve his 2,800+ clients. He believes some people leave their financial advisors not because of a lack of returns but because of a lack of relationships. The Berry Financial Group team begins each day with devotions as they pray for each other and for clients.

His business and personal life reflect his core belief that success comes from the five "F's" - faith, family, finances, fitness, and fun. He married his high school sweetheart, Jan, in 1987. They have four children, Jordan, Jamison, Jana, and Lani. His understanding of retirees and their needs has been enhanced through the personal and financial care he was able to provide his parents during their Golden Years and until their deaths in 2000 and 2001. He exercises daily and enjoys tennis, golf, water sports, and snowboarding, and the time he cherishes most is spent with his family.



***JAN BERRY, CLTC***  
VICE PRESIDENT, BERRY FINANCIAL GROUP, INC.

Jan earned her BS from Francis Marion University in Florence, SC, taught school, worked part time with Richard, and was blessed to be able to spend a great deal of time at home while their children were young. In 2002, Jan began working full-time at Berry Financial Group, received her life and health licenses and also earned her Certified Long Term Care designation (CLTC). She and Richard specialize in helping pre-retirees and retirees build, protect, and preserve their assets. They understand that a financial portfolio should reflect one's age, risk tolerance, and income as well as liquidity needs. Investment choices that offer safety and peace of mind are of utmost importance just before and during retirement. At Berry Financial Group, relationships and service are

key. To better serve clients in the Pee Dee and in the coastal areas of SC and NC, Berry Financial Group has three office locations and 18 team members.

While Richard focuses mainly on portfolio management with an emphasis on reducing market and longevity risks, Jan has a passion for helping clients reduce the risk that health care poses. Through the loss of three of their parents within 18 months from 1999 to 2001, Jan is able to understand the emotional, physical, and financial devastation that long term care events cause. She also educates clients about Medicare options so they can make wise health care choices.

Jan and Richard believe that their roles are ones of service and that Berry Financial Group is truly a ministry through which they can help pre-retirees and retirees better manage the resources with which they have been blessed. They also give back to the financial community by coaching other financial advisors and their teams to better understand the unique aspects of retirement planning. Jan believes that life is about balance with faith, family, finances, fitness, and fun being her priorities. Outside of Berry Financial Group, she enjoys time spent with Richard, Jordan and Anna (oldest/son and wife), Jamison and Allyssa (middle/son and wife), Jana and Reid (youngest/daughter and husband), Lani and Caroline, their first grandbaby. Jan enjoys time spent with family, tennis, water sports, snowboarding, cooking, and card/board/word games.

# Staff Bios



## **REID MATHEWS, RICP, CLTC** Investment Advisor Representative

Reid Mathews was drafted in the 35th round in the 2011 Major League Baseball Draft by the Pittsburgh Pirates right out of high school. He chose to go to college instead and graduated from Coastal Carolina University with a Business Marketing degree in the summer of 2015. He was on the baseball team until a wrist injury led him to hang up his cleats and begin showing people how to leave a legacy and supplement their retirement with tax-free money. He came on as an intern for Berry Financial Group in the spring of 2015 and that is when he met Jana Berry, the daughter of Richard and Jan Berry. They began dating and fell in love almost immediately and got married on July 2nd, 2016. He focuses on the effective and efficient use of life insurance as part of the entire financial plan and specializes in risk management, as well as helping clients pick the right Medicare

supplement once they become eligible for Medicare. In July, 2017, he was selected as one of ThinkAdvisor Magazine's Top 30 Advisors under the age of 30.

He gave his life to Jesus Christ on September 7th, 2014, and is currently an active member of Ocean View Baptist Church in Myrtle Beach, SC. He fully believes in the saying, "The more you give, the more you receive; and the more you believe, the more you achieve."

Just like Mr. Richard Berry, the five F's are a focal point in his business and family life: faith, family, finances, fitness, and fun. He enjoys going to movies and playing tennis when he is not learning about the financial industry. Reid and Jana have a beautiful Goldendoodle dog named Chance. Reid's dad is a State Farm agent which empowered Reid to grow up and realize it is his God given purpose to help people protect their family, grow their assets, and live the financial and purpose driven life of their dreams. Success is a journey, not a destination, and on the way it is important to help and serve others.



## **JANET BOYETTE** Investment Advisor Representative

Janet Boyette joined Berry Financial Group in 2004 after a short retirement from Wachovia Bank. Janet began her 32 year career in banking in 1971, as a secretary. She then progressed through many of the positions of the branch banking system, including Branch Manager, Senior Officer, and Licensed Financial Specialist. During her career in banking she took advantage of available training and attained her Series 6 and Series 63 licenses, which qualified her to better serve her clients with all types of investment products.

She received her BS in Business Administration from Winthrop University, SC Banker's School certification from the University of South Carolina and is a charter graduate of Leadership Pee Dee. Janet has served as

President of the Dillon County Chamber of Commerce, Chairperson of St. Eugene Medical Center's Advisory Board, March of Dimes Walk-a-thon for Dillon County and Dillon County MS Bike-a-thon.

Janet has been an active member of Dillon First Baptist Church since 1960, and has enjoyed several mission trips to Honduras. Janet has been happily married to her husband, Rodney Boyette, since 1983, and has two children, Randy and Shannon, who are presently living in California.

Janet often says joining Berry Financial Group was one of the best decisions she's made in her career.

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