

## 2025 Mid-Year Newsletter

As the eventful first half of the year has come to a close, we would like to provide you with some updates from our team here at Graystone Consulting Charleston.

We trust that you are currently receiving our monthly Market Commentary, if not, you can find the most recent copy here:

[Thought Leadership | Graystone Consulting - Charleston, WV](#)

This is the latest edition of our publication, which originally began around 2010, and has been a regular monthly message from our team since 2014. Written by Katherine Jones, it provides our team's views on the markets and economy, while offering insight into how current events impact our clients' portfolios. If you are not already subscribed, please [\[click here\]](#) to send us an email to be added to our list.

We are also proud to share some recent team updates and recognitions earned by our team over the first half of 2025. Thank you for your continued confidence. We look forward to the remainder of the year.

### - Team Update -

#### Thad Taylor - Registered Client Service Associate

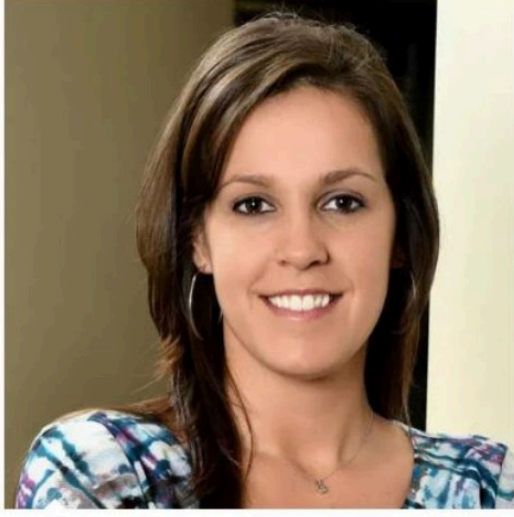
(304) 353-9034

[Thad.Taylor@morganstanley.com](mailto:Thad.Taylor@morganstanley.com)



Thad joined Graystone Charleston in February of 2025 as a Registered Client Service Associate. His role is to assist the team's Wealth Management clients with general account maintenance and transfer of funds.

Thad is a graduate of the University of Kentucky with a BBA in Finance and a minor in International Business. He is Series 7 and 66 licensed.



We would also like to recognize Cassandra Williamson for earning her CIMA® designation and Ryan Mullins for his successful passing of CFA Level 2.

### - Team Promotions -

**Kelly L. Castleberry, CIMA®**  
**Managing Director, Alternative Investments Director**

**John E. Dawson II**  
**Managing Director**

**James Michael Goodwin**  
**Managing Director**

**Austin Goodwin**  
**Associate Vice President**

**Katherine Jones**  
**Senior Vice President**

**Matt Kelly**  
**Institutional Consulting Relationship Manager**

**Brian Anania**  
**Investment Consultant - Relationship Manager**

**Cassandra Williamson**  
**Investment Consultant - Wealth Planning Specialist**

**Ryan Mullins**  
**Wealth Management Analyst**

**Conner Fowler**  
**Institutional Consulting Analyst**

**Missy Short**  
**Portfolio Associate**

### - Team Awards -

#### **2025 Forbes Best-In-State Wealth Management Teams**

#### **2025 Barron's Top 100 Institutional Consulting Teams**

#### **2025 Forbes Best-In-State Wealth Advisors**

**John Dawson**  
**Michael Goodwin**

**Kelly Castleberry**

#### **2025 Barron's Top 1200 Financial Advisors: State-by-State**

**John Dawson**

We are honored to be recognized on several annual rankings this year, recognizing our commitment to our clients and the hard work of our growing team. Thank you to our colleagues and partners who support the integrated effort of the Graystone - Charleston group.

## Graystone Consulting - Charleston, WV



*L to R: Brian Anania<sup>1</sup>, Chris Heller<sup>2</sup>, Michael Hill<sup>3</sup>, Cassandra Williamson<sup>4</sup>, Katherine Jones<sup>5</sup>, Kelly Castleberry<sup>6</sup>, Matthew Kelly<sup>7</sup>, Mike Goodwin<sup>8</sup>, John Dawson<sup>9</sup>, Austin Goodwin<sup>10</sup>, Melissa Short<sup>11</sup>, Conner Fowler<sup>12</sup>, Ryan Mullins<sup>13</sup>, Deltha Shamblen<sup>14</sup>*

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2025 Forbes Best-In-State Wealth Management Teams  
[Source: Forbes (Awarded Jan 2025). Data compiled by SHOOK Research LLC based for the period 3/31/23–3/31/24.]

2025 Barron's Top 100 Institutional Consulting Teams  
[Source: barrons.com (Awarded April 2025). Data compiled by Barron's based on time period from Dec 2023 - Dec 2024.]

2025 Forbes Best-In-State Wealth Advisors  
[Source: Forbes.com (Awarded Apr 2025). Data compiled by SHOOK Research LLC based on time period from 6/30/23-6/30/24.]

2025 Barron's Top 1200 Financial Advisors: State-by-State  
[Source: barrons.com (Awarded Mar 2025). Data compiled by Barron's based on time period from Sept 2023 - Sept 2024.]

#### [Awards Disclosures](#)

#### [Titles](#)

- 1: Brian Anania, CFP® - Assistant Vice President, Investment Consultant, Relationship Manager
- 2: Christopher Heller, CFA, CFP®, CIMA® - First Vice President, Senior Portfolio Manager
- 3: Michael D. Hill, CRPS®, QPFC - Senior Vice President, Institutional Consultant, Corporate Retirement Director
- 4: Cassandra Williamson, CFP® - Assistant Vice President, Investment Consultant
- 5: Katherine Jones - Senior Vice President, Business Development Director
- 6: Kelly L. Castleberry, CIMA® - Managing Director, Financial Advisor, Family Wealth Director
- 7: Matthew Kelly, CRPS® - Vice President, Institutional Consulting Relationship Manager
- 8: James Michael Goodwin - Managing Director, Financial Advisor, Senior Portfolio Management Director
- 9: John E. Dawson II - Managing Director, Institutional Consulting Director
- 10: Austin Goodwin - Associate Vice President, Financial Advisor
- 11: Melissa Short - Portfolio Associate
- 12: Conner Fowler - Institutional Consulting Analyst
- 13: Ryan Mullins, CRPS® - Wealth Management Analyst
- 14: Deltha Shamblen - Client Service Associate

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CRC 4695859 07/25