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# AUGUST

## ► publisher's note By Robert Smith, Area Director/Publisher

### Dear Upstate Real Producers,

Welcome to the August 2024 edition of *Upstate Real Producers Magazine*! As we continue to celebrate the remarkable talents and achievements within our real estate community, this month's issue is packed with inspiring stories and commendable successes. Featuring a mix of seasoned professionals, rising stars, and valued partners who continue to make an indelible mark on our community.

### Cover Feature Realtor: Jennifer Simms

Our cover story shines the spotlight on Jennifer Simms, a top-performing realtor whose dedication, expertise, and innovative approach have set new standards in the industry. Jennifer's journey from a determined novice to a market leader is a testament to the power of perseverance and passion. Her client-centric philosophy and deep market insights have not only garnered her numerous accolades but have also made her a trusted name among Upstate homebuyers and sellers.

### Rising Star: Pam Borghesani

Pam Borghesani is our rising star this month, making waves with her fresh perspective and dynamic energy. In just a short time, Pam has established herself as a formidable force in the real estate scene. Her ability to connect with clients, understand their needs, and deliver exceptional results has quickly earned her a reputation for excellence. Pam embodies the future of real estate, blending traditional values with modern strategies.

### Agent Spotlight: Tyler A.V. Hudzik

In our Agent Spotlight, we feature Tyler A.V. Hudzik, whose dedication to his craft and community involvement sets him apart. Tyler's approach to real estate is holistic, focusing not just on

transactions but on building lasting relationships and contributing positively to the community. His commitment to continuous learning and improvement is an inspiration to his peers and a benefit to his clients.

### Celebrating Leader: Jeremy Russell

We are thrilled to celebrate Jeremy Russell, a leader whose vision and leadership have significantly impacted the Upstate real estate market. Jeremy's strategic insights and innovative solutions have driven his team to new heights, and his mentorship has cultivated a culture of excellence and collaboration. His leadership style, marked by empathy and strategic thinking, makes him a standout figure in our industry.

### Amazing Preferred Partner: Wagner Wealth Management

Lastly, we honor Wagner Wealth Management as our Amazing Preferred Partner. Their meticulous attention to detail, exceptional customer service, and unwavering commitment to quality have made them an invaluable partner to many real estate professionals. Wagner Wealth Management's dedication to ensuring the safety and satisfaction of homeowners exemplifies the high standards we all strive for in our work.

As always, *Upstate Real Producers Magazine* is proud to showcase the best of our real estate community. We hope you find inspiration in these stories and continue to pursue excellence in your own endeavors. Here's to another month of achievements, growth, and collaboration!

Warm regards,



**Robert Smith**  
Publisher,  
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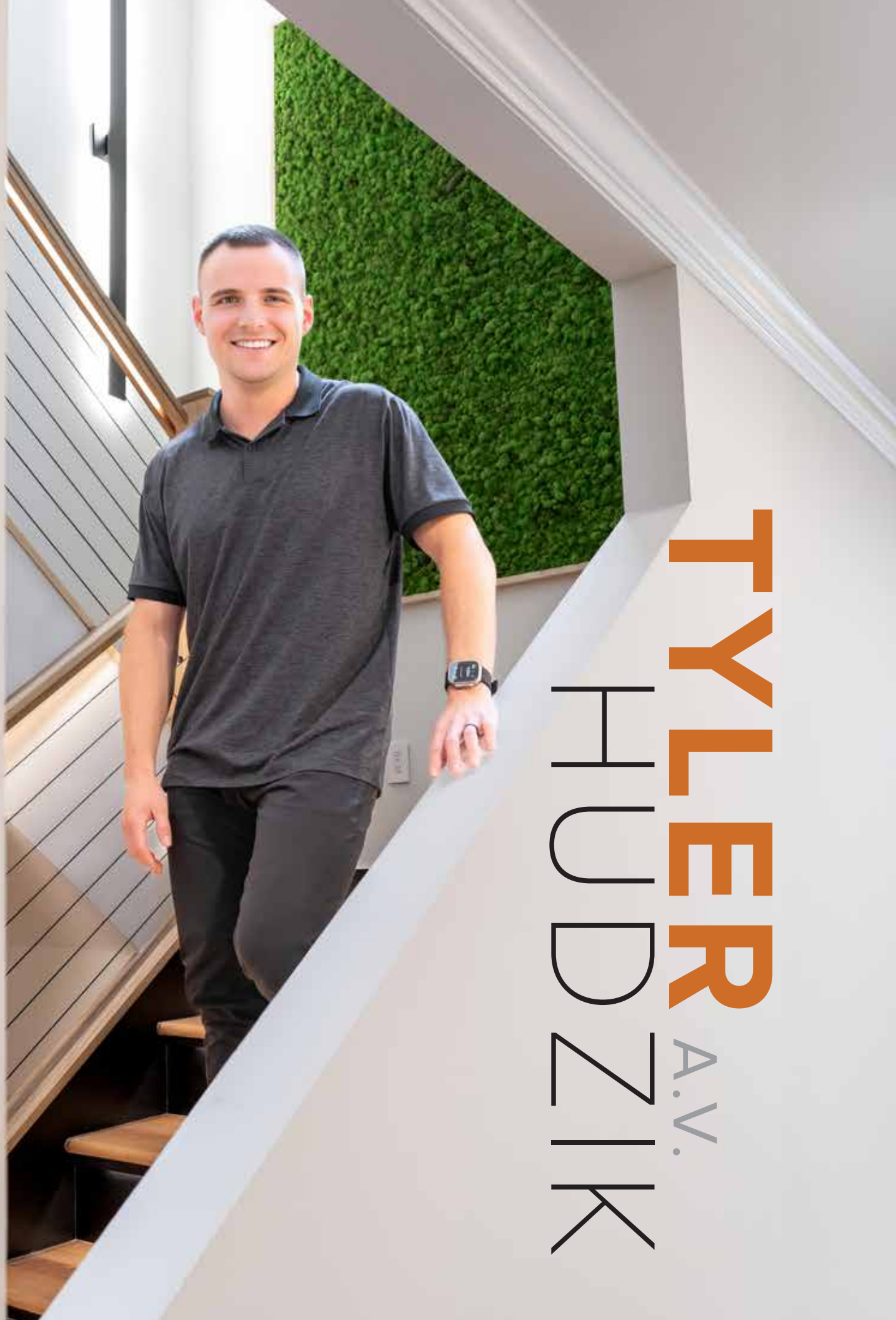
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# TYLER HUDZIK A.V.

## A Beacon of **EXCELLENCE** in Greenville Real Estate

Photos By: Tres Dabney (True North Productions) | Written By: Amy Porter and Tyler A.V. Hudzik

Tyler A. V. Hudzik brings a rich family heritage and a dedication to exceptional service to the Greenville real estate market. As a third-generation REALTOR®, he carries a legacy of relationship-based business and community enrichment. Inspired by his grandfather's dual role as a small-town barber and real estate broker, Tyler inherited a passion for building connections and helping others find their ideal space. He is also grateful to have grown up with entrepreneurial parents, as it further instilled adaptability and a strong work ethic, which continue to shape his professional journey.

### **Building a Strong Foundation & Finding His Niche**

While attending North Greenville University, Tyler's desire to carve his own path and continue the family tradition led him to obtain his real estate license in 2014. His journey began at The Yukich Team at Allen Tate Realtors, where he developed his craft under the mentorship of his family and industry veterans. During this time, Tyler discovered his affinity for the diverse and dynamic condo and townhouse market in Greenville. A desire to redefine excellence in this niche sparked a tireless pursuit of mastery with a client-centric approach.

### **Commitment to Growth and Innovating the Industry**

In 2021, Tyler sought a platform that aligned with his vision and desire to enhance his practice continually. He joined forces with The Gallo Company, a premier independent brokerage known for excellence and forward-thinking processes. This strategic move reflects Tyler's dedication to continuous improvement, ensuring his clients benefit from cutting-edge resources while navigating Greenville's evolving real estate landscape. With a sharp focus on delivering exceptional client experiences and driving sustainable growth, Tyler is grateful to share dreams with his partners and friends at the brokerage. The Gallo Company is poised to set new industry standards, foster a culture of inclusivity and innovation, and reinforce the brokerage's mission to elevate others to new places.

### **A Heart Transformed for Service and Leadership**

Tyler's faith was instrumental in developing that mission statement and illuminated his path with purpose and perspective. In 2018, Tyler's life underwent a profound transformation upon coming to faith in Jesus. Before that pivotal moment, Tyler admits to a life





Company as a Client Care Coordinator, where she helps support Tyler, and the rest of the team, through navigating the transaction process. This care for one another reflects a dedication to fostering growth and shared achievement with loved ones.

**A Legacy Built on Passion and Integrity**

Tyler A.V. Hudzik's commitment to compassion, unwavering integrity, and continuous improvement are the hallmarks of his approach to Greenville real estate. His infectious enthusiasm, genuine care for his clients, and drive to push the industry forward make him a driving force in the community he serves. Tyler's story illustrates the transformative power of blending passion, perseverance, and purpose—a combination that fuels exceptional results.

TYLER A.V. HUDZIK'S COMMITMENT TO **COMPASSION, UNWAVERING INTEGRITY, & CONTINUOUS IMPROVEMENT** ARE THE HALLMARKS OF HIS APPROACH TO GREENVILLE REAL ESTATE.

driven by external validation and performance metrics, which led to personal struggles and relational challenges. However, his encounter with God brought about a profound shift as he discovered a newfound sense of worth, freedom, community, and desire to serve others. His faith is integral to shaping his priorities and driving his passion to uplift others. Alongside serving at his church, Tyler and his wife, Walker, invest in local initiatives, making a tangible impact on their community.

**Caring Collaboration**

Tyler's unwavering support for his wife, Walker, is a pillar of his life. Their shared passions

include travel, exploring new culinary experiences, and building collaborative ventures. The Hudziks aspire to enhance each other's strengths while filling in the gaps of their weaknesses. They focus on operating as a team, whether at home or at work. A prime example of their collaboration is Houni's Italian Ice, a business Walker co-founded with her sister, Morgan. Tyler's behind-the-scenes support during the pandemic-era launch was critical to the company's success. He takes immense pride in his role as Houni's number-one fan, often aiding with errands and helping at events and catering functions. Walker also has recently joined The Gallo





A DEVOTED MOM,  
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*Jennifer Simms is a name synonymous with dedication and expertise in the real estate industry. As a seasoned realtor with BHHS C Dan Joyner, Jennifer brings a wealth of experience and a passion for helping clients find their dream homes. Combining her love for her family with her professional ambitions, Jennifer seamlessly balances being a devoted mom, wife, and realtor, embodying the perfect blend of personal and professional success.*

# JENNIFER ANN SIMMS



cover story

Photos By: Tres Dabney  
(True North Productions)  
Written By: Amy Porter

specializes in various areas, including flipping, luxury homes, and new construction sales.

She spent seven years with Allen Tate and eight years with Coldwell Banker before recently moving to Berkshire Hathaway. This move allowed her to start a team to better serve her clients, working closely with Carolina Transaction Experts and her team member, Mary Ellen Bradley her long time assistant and now a licensed agent herself. Jennifer chose Berkshire Hathaway for its top position in the upstate and its flexibility in running one's business.

Jennifer describes herself as a dedicated mom, wife, and realtor who loves her job and couldn't see herself doing anything else. She is a proud mother of three: Jack, 22, Ava, 20, and Vivian, 12. Raised in a military family, Jennifer has lived all over but has called Greenville home the longest. Her journey into real estate began in 2008 after spending 12 years as a retail store manager and furniture merchandiser which transitioned into helping clients stage their homes for sale. Seeking more flexibility to be there for her children, Jennifer transitioned into real estate, leveraging her extensive customer service experience to excel in this new career.

With 16 years of full-time real estate experience, Jennifer

Jennifer's approach to helping clients find their perfect home is centered on aligning her goals with theirs. She prioritizes their specific needs and wants, providing meticulous attention to detail to ensure a lifelong client relationship. A memorable success story for Jennifer involves the intricate logistics of selling and buying in the same market, ensuring smooth transitions for her clients. Her ability to make the process less daunting for families is a testament to her expertise.

In her impressive real estate career, Jennifer has achieved over \$100M in career volume, with a total volume of \$26M last year. She attributes her success to surrounding herself with smarter individuals and tapping into their strengths. Currently, she is passionate about serving her loyal past clients and their referrals. She is excited about launching the second phase of Alpine Heights in Anderson with Kristopher Homes and other new neighborhoods planned for the year's end.

The most rewarding part of Jennifer's business is working with first-time homebuyers, sharing in their excitement and helping them build generational wealth. Her son's purchase of his own home at 20 is a personal highlight. Looking ahead, Jennifer sees real estate as a blessing that has helped her create a beautiful life for her family. She is grateful every day for her perfect career path.

Family is at the core of Jennifer's life. Jack, 22, is an on-site superintendent with Fairview Custom Homes in the Cliffs. Ava, 20, is a junior at East Tennessee State University, majoring in environmental health. Vivian, 12, is a seventh grader at St. Joseph's Catholic School. Jennifer's husband, Robert Simms, is an operating partner with Tupelo Honey Cafe. Her sister, Kristina Murphy, owns and operates the Larkins Restaurant Group. Hospitality and customer service are part of their DNA.

Outside of business, Jennifer enjoys reading, traveling, and dining at local restaurants. She loves flipping houses and managing vacation rentals, finding joy in setting up Airbnbs.



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OR ADMIRE,  
I CAN FIND  
NO COMMON  
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BUT AMONG  
THOSE WHOM  
I LOVE, I CAN;  
ALL OF THEM  
MAKE ME  
LAUGH.”



For Jennifer, success is about constant learning and self-improvement. She is always competing against herself to do better each day. Known for her relentless pursuit of excellence, Jennifer never stops until the job is done, embodying a tireless dedication to her work and her clients. Her clients consistently give testimony to her unwavering work ethic.

Jennifer's advice to aspiring top producers is simple: always answer your phone. Every call is an opportunity, and every house, regardless of price, location, or size, is a chance to earn more business. The one thing she wants the article to capture about her is her commitment to exceeding expectations. Every client receives the best possible service, ensuring they are eager to refer her to friends, family, and colleagues.

Jennifer wants to be remembered for raising strong, healthy children who contribute to society in meaningful ways. She finds immense joy in her family's achievements and their commitment to making a positive impact in their respective fields. Jennifer's favorite quote by W.H. Auden encapsulates her philosophy on life and relationships: "Among those whom I like or admire, I can find no common denominator, but among those whom I love, I can; all of them make me laugh." This quote reflects Jennifer's belief in the power of laughter and joy in fostering deep, meaningful connections with others. As she continues to excel in her real estate career, Jennifer remains dedicated to serving her clients with the highest level of care and professionalism, striving to exceed expectations and build lasting relationships. Her story is one of relentless dedication, a commitment to excellence, and an unwavering passion for making a difference in the lives of those she serves.



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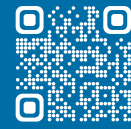
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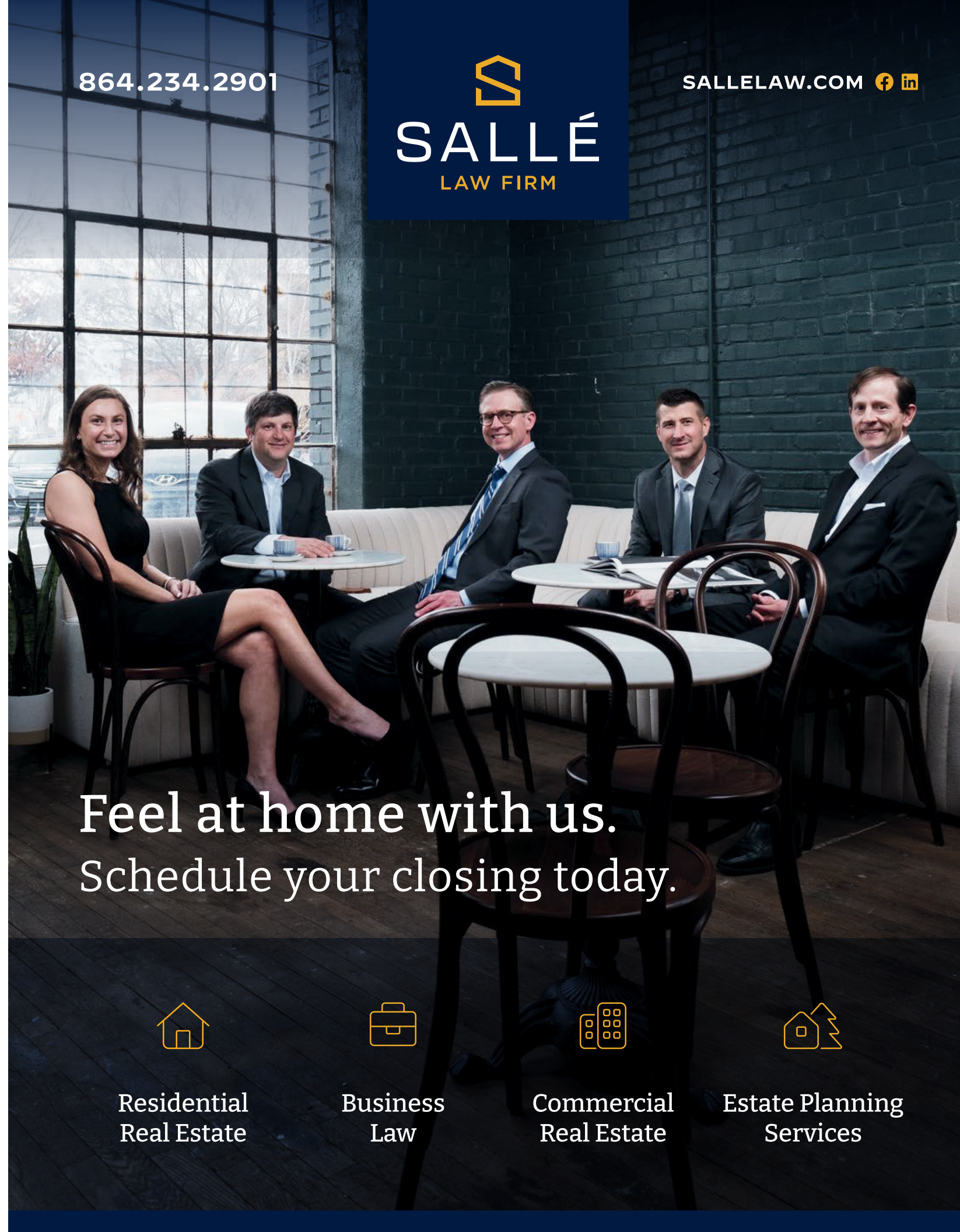
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J

**EREMY RUSSELL** embodies the values of hard work and determination, hallmarks that have driven his impressive career in real estate. Starting in the cellular industry, Russell quickly rose through the ranks to management. However, he saw greater personal fulfillment and potential in real estate, a field where effort directly correlates with success. This realization prompted his transition to real estate in 2007, first part-time and then full-time by 2009.

Russell's career in real estate began with major firms, but his pivotal moment came during an interview with Jim Fritzsche at RE/MAX Foothills. Russell was drawn to the comprehensive approach of working with both buyers and sellers, which he experienced while teaming up with Mark Kingsbury and the Carolina Team. His journey took him through RE/MAX Realty Professionals and eventually led to the establishment of his own team, Jeremy Russell & Associates, in 2015. By 2017, they were the #1 RE/MAX team in the Upstate of South Carolina.

In 2018, Russell launched his own franchise, RE/MAX REACH, in Mauldin, SC, and expanded to a second location in Boiling Springs in 2021. His brokerage model offers agents extensive resources without traditional team splits, providing

marketing support, office assistance, and client appreciation events. This approach ensures agents thrive without burnout, embodying his philosophy of working hard and playing hard.

Over his career, Russell has achieved over \$130 million in personal sales volume, earning accolades like the RE/MAX Hall of Fame Award in 2015 and the Lifetime Achievement Award in 2021. His success in 2022 alone saw a volume of \$13,626,650. Beyond his own achievements, Russell is passionate about mentoring his agents, drawing from his own experiences through various market conditions.

Mentorship has played a crucial role in Russell's career. Influences like Jim Fritzsche, Milton Shockley, and Mark Kingsbury have been significant, along with national trainers like Brian Buffini, whose referral-based business model Russell has adopted. This focus on relationships and continuous learning is integral to his business philosophy.

Russell's journey hasn't been without challenges. A rocky start at Clemson University taught him the value of persistence and dedication, lessons that have served him well in his professional life. Today, his greatest rewards come from the balance his career allows, particularly the time he spends with his family. He

*A Journey of Dedication and Success in Real Estate*

# JEREMY RUSSELL

Photos By: Carolina House Shots | Written By: Amy Porter



values creating a sustainable work-life balance for himself and his agents, understanding that long-term success requires managing both professional and personal well-being.

#### FAMILY LIFE

Family is central to Jeremy Russell's life, providing a foundation of support and joy. He and his wife, Jessica, have been married for 19 years. Jessica works as a Postpartum Nurse at St. Francis Eastside Hospital on a PRN basis and also serves as the Event Coordinator for RE/MAX REACH office events. Her dual roles reflect the couple's shared commitment to both their professional and personal lives.

Their son, Blake, is 11 years old and an enthusiastic participant in various sports. Blake plays baseball at Mauldin Rec, basketball at Brookwood Church, and tennis at Holly Tree Country Club. His love for gaming adds another dimension to his active lifestyle.

Morgan, their 9-year-old daughter, is an avid competitive gymnast at Acrosmith Gymnastics and also enjoys ballet at Dance Theater of Greenville. Her dedication to her sports is mirrored by her parents' support and encouragement.

As a family, they cherish outdoor activities, especially cycling. The Swamp Rabbit Trail is a favorite destination, where they've set a family record of cycling 14 miles together. These outings not only keep them active but also strengthen their family bonds.

#### HOBBIES AND INTERESTS

Outside of his professional life, Jeremy Russell is passionate about various hobbies that keep him engaged and energized. Cycling is a significant interest, particularly mountain biking. Although he enjoys road biking, the thrill of off-road trails, whether during the day or night, is unmatched. This hobby also connects him with a

vibrant community of cyclists in the Upstate, fostering new friendships and shared adventures.

Jeremy's past as a competitive cross-country mountain bike racer adds another layer to his rich tapestry of interests. Competing throughout the Southeast, his notable achievement was ranking third in the South Carolina State Championships in Expert Juniors in High School, sponsored by a local bike shop. This competitive spirit and love for the outdoors continue to influence his lifestyle today.

Basketball is another favorite pastime. Jeremy participates in a men's basketball league for players over 40. Despite an ACL injury in 2011, his determination saw him return to the sport he loves. His involvement in basketball reflects his commitment to maintaining an active lifestyle and his resilience in overcoming physical setbacks.

Boating is a cherished family activity. Jeremy and his wife initially enjoyed various water sports, but now they focus on driving their kids around the lake. Whether it's tubing, wakeboarding, knee boarding, or skiing, these outings provide a staycation-like experience, offering relaxation and family fun.

Camping is another hobby that brings the Russell family closer. They own a pull-behind camper and often take trips that allow them to disconnect from their busy lives and reconnect with each other. The close quarters of the camper encourage family activities and bonding, making each trip a special experience.

#### DEFINING SUCCESS

For Jeremy Russell, success is about the journey rather than an end result. His early career goal of earning \$100,000 in real estate has evolved into a mission to create a lasting legacy. He emphasizes the importance of continuous improvement and advises others to avoid complacency. In his role as a leader, Jeremy prides himself on guiding his agents with the same dedication and perseverance that has defined his own career.

#### COMMITMENT TO COMMUNITY AND LEGACY

In addition to his professional accomplishments, Russell is

deeply committed to giving back. He supports the Children's Miracle Network, contributing locally to Prisma Health Children's Hospital. His office is designated as a Miracle Office, with donations made on every transaction.

Looking to the future, Russell aims to expand his brokerages while maintaining a quality-over-quantity approach. He believes in fostering a healthy culture and building lasting relationships within the industry. He remains dedicated to learning and adapting, ensuring his leadership style evolves with the market.

#### FINAL THOUGHTS

Jeremy Russell's legacy is one of patience, fairness, and passion. He aspires to be remembered as a leader who prioritizes his agents' success and development, always willing to go the extra mile. His advice to others in the field is simple: keep learning, stay adaptable, and never lose sight of the importance of relationships in building a sustainable business.

For those looking to connect and share insights, Russell is always open for a coffee and a chat, ready to mastermind and collaborate. His favorite quote, "The more you learn, the more you earn," perfectly encapsulates his approach to both life and business.



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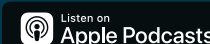
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# Pam Borghesani



A JOURNEY OF SERVICE, PERSEVERANCE, AND FAITH IN REAL ESTATE

## ▶▶ rising star

Pam Borghesani, a dynamic realtor with Bluefield Realty Group, embodies a spirit of service, perseverance, and unwavering faith. Licensed in 2022, Pam's journey into real estate was a natural transition shaped by a rich tapestry of life experiences and a strong desire to help others. Her career is a testament to the power of resilience and the importance of building genuine connections.

### *A Diverse Career Path*

Pam's professional journey is as varied as it is impressive. Before real estate, she excelled in numerous roles, from a top director at Mary Kay, where she earned 15 free cars including two Pink Cadillacs, to positions as a paralegal, bridal consultant, bank teller, server, and even a Records Specialist in a prison. Each role added a layer to her confidence and skill set, teaching her the value of adaptability and empathy.

Transitioning into real estate was inspired by her mentor, Laurie Hughes, and a chance encounter during the purchase of her home in South Carolina. Laurie's passion and dedication to helping others gave Pam the courage to step out of her comfort zone and pursue a career in real estate. Joining Bluefield Realty Group was an easy decision, as she resonated with the company's core values and had confidence in the leadership of Michael Smith.

### *Professional Milestones and Achievements*

Since starting her real estate career in September 2022, Pam has demonstrated remarkable success. Her career volume stands at \$11,533,000, with a total volume of \$5,813,254 last year alone. These numbers reflect not just her hard work, but her commitment to building lasting relationships with clients and colleagues.

Pam attributes much of her success to her mentor, Laurie Hughes, whose guidance and unwavering support have been invaluable. Laurie's ethical, honest, and humble approach to real estate has deeply influenced Pam, shaping her own professional ethos.

### *Overcoming Challenges*

Pam's journey has not been without its challenges. Early on, she struggled with self-esteem and confidence. However, her work with Mary Kay became a turning point, helping her develop life skills and the art of effective communication. Pam learned that genuine care for people should always come first, a lesson that has been fundamental in her real estate career. Her diverse career path also taught her resilience and the importance of perseverance. From working multiple jobs to making significant career changes, Pam's drive to succeed has always been fueled by her desire to make a positive impact on others.

### *Passion for Real Estate and Helping Others*

Currently, Pam is passionate about mentoring new agents, sharing her determination and resilience. She believes that setbacks are stepping stones to success and is dedicated to being a supportive cheerleader for others in the industry. Her passion extends beyond



transactions; she is deeply committed to sharing God's love through her interactions with clients, vendors, and fellow realtors.

Looking ahead, Pam aspires to continue leveraging her experiences to guide and support others in their real estate journeys. She firmly believes in the Golden Rule: helping others achieve their goals will, in turn, help her achieve her own.

### **Family and Community Involvement**

Family and community are central to Pam's life. She and her husband, Dave, own a home in Honea Path, South Carolina, where they share a warm, bustling household. Living with them is Pam's mother, Mary, who has an in-law apartment in their home, allowing them to stay close and support each other daily.

Their older son, Craig, recently moved to South Carolina from Florida, where he was involved in ministry and education. Craig is now a successful car salesman at Parks Buick in Greenville. His success is a testament to his people-first approach, a value he shares with his mother. Craig's wife, Joleen, shares a passion for working with children and is Pam's amazing assistant. The couple enjoys cooking together and traveling, often creating delicious meals and exploring new destinations.

Their younger son, Nick, is a talented soccer player and student, currently pursuing a degree in Organizational Leadership at Faith Baptist Bible College in Iowa. Nick also holds a Business Administration degree from Bob Jones University. Like his parents, Nick is driven by a desire to help others and make them feel valued and loved.

Pam and her family cherish their time together, whether it's dining out, catching a movie, or engaging in friendly competition with games like The Mexican Train Game and The Blockbuster Game. They love to laugh and create lasting memories together.

Additionally, Pam and Dave have extended their family through their kindness and hospitality. Alefe Phakos and Joseph Lopez, who lived with them for nearly two years each, are considered part of the family. Although Alefe and Joseph now reside in Massachusetts, they remain close to the Borghesanis' hearts and visit whenever possible.



*Individual commitment to a group effort: that is what makes a team work, a company work, a society work, a civilization work.*

Pam is actively involved in her church, Temple Baptist of Anderson, participating in a ladies' bible study, children's ministry, and the choir. Her hobbies include working out, dining out, trying new restaurants, going to the movies, and traveling.

Pam and her family are also dedicated to charitable work, supporting Compassion International, K-Love radio, and various missionaries through their church. Their home has been

a refuge for those in need, reflecting Pam's commitment to helping others.

### **Defining Success and Legacy**

For Pam, success is defined by putting God first and treating others with kindness and compassion. She believes in the importance of discipline and hard work, guided by her favorite quote from Galatians 6:9: "And let us not be weary in well doing; for in due season we shall reap, if we faint not."

Pam wants to be remembered for her kindness and compassion, and her commitment to making a difference in the lives of others. She prides herself on being quick to respond and easy to work with, ensuring smooth transactions for all her clients.

In every aspect of her business, Pam trusts that God is in control. Her journey in real estate is a reflection of her faith, resilience, and unwavering dedication to serving others.

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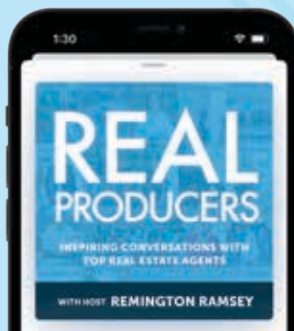
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## EXCELLENCE IN COMPREHENSIVE FINANCIAL PLANNING

Wagner Wealth Management, nestled in the heart of Greenville, SC, at 3 Legacy Park Road, Suite A, stands out as a premier boutique financial advisory firm. Founded in 2007 by Dan Wagner, a seasoned expert with over 25 years of experience, the firm is committed to addressing complex financial needs with a personalized and team-oriented approach.

Dan Wagner, inspired by his early exposure to customer service and his impactful internships with American Express® Financial Advisors and U-Vest™ Financial, has crafted a firm that prioritizes client-focused, comprehensive wealth management. Wagner Wealth Management excels in helping high-net-worth clients and business owners navigate complex financial planning, succession, and retirement strategies. Running a successful

practice based on performance and results is something that Dan feels his firm and top-performing business owners have in common. “We work with a number of higher-end business owners,” Dan explains, “their tax structures as business owners or 1099 contractors present various challenges and opportunities. We are familiar with how to maximize those opportunities and how best to implement them. We also know that many of them are their own personal brand, and that needs to be recognized in all phases of planning, especially in succession and estate planning.”

Dan’s passion for finance is mirrored in his personal life. Alongside his wife, Jill, with whom he has shared 25 wonderful years of marriage, Dan enjoys boating on Lake Keowee, golfing, and hunting. Their son, Trey, is currently attending the



### ▶ preferred partner spotlight

Written By: Amy Porter  
Photography By: Jerry Coli (CREM)



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University of South Florida, pursuing his academic and professional aspirations. Their daughter, Katie, is beginning an exciting new chapter as a freshman at the University of South Carolina. The Wagner family’s strong bond and shared interests in outdoor activities reflect Dan’s commitment to family values and community engagement. This commitment extends to the firm’s philosophy, where the success of their clients and the well-being of Greenville are intertwined.

Wagner Wealth Management prides itself on its unique team approach. Unlike many firms where advisors work independently, Wagner Wealth Management’s nine-member team collaborates to leverage their diverse expertise, ensuring a holistic and robust financial strategy for each client. Dan has assembled a team that can tackle any issue related to taxes, insurance, business structure, real estate, credit, and trusts. The firm is also

adept at developing strategies for business succession, cementing its reputation for excellence, particularly among high-net-worth individuals and business owners who seek sophisticated financial planning and business succession strategies.

A testament to their success is a notable case where a prospective client with a \$300 million net worth transitioned their entire portfolio to Wagner Wealth Management after recognizing the benefits of a customized, boutique approach over a large brokerage firm. This story exemplifies the firm’s ability to offer superior, cost-effective solutions that resonate with discerning clients.

Dan attributes his success to his firm’s ability to balance the complex demands of business and personal financial planning, a service especially valued by business owners and high-net-worth individuals. “We’ve really differentiated ourselves in the

business owner market, and we help these clients balance both their business and personal goals. They need succession plans for their businesses, but they also need trust and estate planning for their families. Satisfying both business demands and personal demands is a big part of what we do at Wagner Wealth Management.” This dedication to providing true wealth management is reflected in their holistic services and the deep experience of their advisors, some of whom boast over 30 years in the industry.

What makes Wagner Wealth Management unique is the depth of experience and comprehensive service they offer. “We’ve got some of the most experienced advisors in Greenville, including three with near or over 30 years’ experience,” Dan states. “We’re in step with someone who has sold a \$200 million company or someone who has plans to retire after working for a company. We can help folks across the board.” Dan further elaborates, “We are truly skilled and trained to provide comprehensive wealth management. We are a TRUE wealth management firm. Anyone that has a brokerage license can call their firm ‘wealth management,’ but we are highly skilled and trained to provide comprehensive wealth management.” In addition to the extensive scope of money matters that Wagner Wealth Management tackles, they also employ a true team approach. “Most firms have a team of people that share an office and a website but work on all their clients independently. We truly work as a team,” Dan shared.

Wagner Wealth Management also believes in the philosophy that all ships rise with the tide. That’s why Dan and his team are deeply committed to giving back to the community. They sponsor local events and actively participate on the boards of multiple non-profit organizations. “Greenville has come such a long way since our time here, and we try to support the community in any way we can,” Dan notes, underscoring the firm’s dedication to fostering local growth and prosperity.

Located in the vibrant Hollingsworth Park, Wagner Wealth Management is ideally situated to serve both business and residential clients. Their

strategic location and community involvement underline their commitment to the region’s growth and prosperity.

Dan Wagner’s professional journey, from building a \$15 billion investment platform at Carolina First Bank to establishing a client-focused firm, highlights his dedication to client success and ethical practice. His favorite quote by Vince Lombardi, “Individual commitment to a group effort: that is what makes a team work, a company work, a society work, a civilization work,” aptly encapsulates the ethos of Wagner Wealth Management.

For those seeking comprehensive and personalized financial solutions, Wagner Wealth Management stands as a beacon of trust and expertise. Contact them at (864) 236-4706 or visit their website at [www.wagnerwealthmanagement.com](http://www.wagnerwealthmanagement.com) to learn more about how they can help achieve your financial goals. Follow them on Instagram and Facebook at @wagnerwealthmanagement for the latest updates and insights.



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▶▶ event coverage

# Upstate Real Producers “REALtalk” Mastermind Event Recap

Written By: Amy Porter



On Tuesday, June 4, 2024, *Upstate Real Producers* hosted the highly anticipated “REALtalk” Mastermind Event at Zen, located at 924 South Main Street in Greenville, SC. The event, which ran from 1 PM to 4 PM, was a resounding success, attracting some of the top REALTORS® from the upstate region. Attendees had the opportunity to hear from an esteemed panel of industry leaders, including Jana Chandler of Berkshire Hathaway, Gundi Simmons of JW Martin Real

Estate, Talia Gilia of Real GVL, Laurie Hughes of Blue Field Hughes, and Adam Taylor of Keller Williams.

These top-tier professionals, who collectively closed over \$200 million in volume and nearly 275 units in 2023, shared their invaluable insights on various topics such as luxury real estate, overcoming industry challenges, transitions in real estate, effective networking strategies, sustaining long-term success, and leveraging social

media in today’s market. The panelists’ advice was particularly beneficial for those looking to excel from the ground up, starting with no prior relationships or connections.

Gundi Simmons emphasized the optimal times for buying and selling new construction, highlighting the end of the year as particularly advantageous. He provided detailed insights into the new construction market, offering strategies for navigating this segment effectively.



Adam Taylor shared his impressive achievement of having 37 properties under contract, attributing his success to consistency and focus. He stressed the importance of consistently putting oneself in front of potential clients, creating efficiencies, and surrounding oneself with the right people.

Laurie Hughes, affectionately known as the Godmother of Real Estate, was a standout speaker. Known for her nurturing demeanor yet fierce business acumen, Laurie has been referenced over 62 times by her peers. Despite her Mary Poppins-like appearance, she is a formidable force in real estate. Laurie spoke about the divine blessings she attributes to her success, emphasizing that her faith in God has been the source of her income. She advised investing in oneself for skill and knowledge development, ensuring that personal growth translates into professional excellence.

Talia Gilia shared her unique journey from Israel to becoming a successful REALTOR® in the upstate. Starting without an inner circle, Talia had to innovate and think outside the box to make her mark in the industry. She stressed the importance of authenticity, relationship-building, and taking a personalized approach to each transaction. For Talia, real estate is not just about selling a product but about forging genuine connections with clients and nurturing those relationships from the ground up.

Jana Chandler highlighted the critical importance of communication in real estate. She advised fellow REALTORS® to always be prepared to engage with prospective buyers calling about a home listing, underscoring the necessity of being responsive and approachable. Jana emphasized that effective communication not only facilitates smoother transactions but also fosters better working relationships among REALTORS®, encouraging a more collaborative and supportive professional environment.



Guest & Brady Attorneys at Law

The event was made possible by the generous support of our sponsors: Swamp Rabbit Moving, Owners Choice Construction LLC, Guest & Brady Attorneys at Law, and Pro-Tech Inspections. Their contributions helped ensure the event's success and demonstrated their commitment to supporting the upstate real estate community.

The event concluded with a social/networking session, allowing attendees to connect with their peers and discuss the day's insights in a more relaxed setting. The "REALtalk" Mastermind Event not only provided practical "tips of the trade" but also fostered a sense of community among upstate real estate professionals. This event was in line with *Upstate Real Producers'* mission to inform, connect, and inspire through monthly publications and social events, ultimately enhancing the value provided to clients and aiding in the development of better real estate businesses. The attendees left feeling motivated and equipped with new strategies to apply to their own practices.



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