

High Country Wealth Management

High Country Tax & Consulting

One successful couple, two thriving businesses

High Country Wealth Management first joined SkyLine/SkyBest as a member in 2014 after operating in Georgia for 20 years. When Jeff and Kayla Davis married in December of last year, Kayla moved her tax and consulting firm to Banner Elk from Asheville. Jeff, meanwhile, has been running his financial advisory firm here since 2014.

Convenience Factor

The two businesses, High Country Wealth Management (Jeff's) and High Country Tax & Consulting (Kayla's) must be kept separate for legal reasons. But the two are under the same roof and serve many of the same clients. "Being able to meet with a tax advisor and a financial advisor at the same table, under the same roof, creates a convenience factor for our clients," states Jeff.

Kayla notes, "Both businesses have grown quickly since we moved to the new location two months ago. We're looking forward to adding more staff, including a college intern, in the coming months, in addition to our office assistant."

Serving Clients and the Community

Typical clients for both businesses include those who are retired or getting ready to retire, companies that have retirement plans for their employees, and foundations and endowments that need a financial manager. In particular, High Country Tax & Consulting works with many small businesses. Kayla comments, "I essentially serve as the CFO for many of these companies, which is more economical for them than having a full-time CPA on staff."

Jeff says, "Kayla and I each bring 25-plus years of experience, provided locally, so clients don't have to travel to a larger city. Our clients appreciate the local ownership and the fact that we're both very involved in the community."



Jeff & Kayla Davis

Jeff's community service includes being on the board of directors for several organizations: Williams YMCA of Avery County, the Avery County Chamber of Commerce, Kiwanis Club of Banner Elk and the Mayland Community College Foundation. Kayla serves on the board of directors of the Kiwanis Club of Banner Elk Foundation and on the Beech Mountain Club finance committee.

The Davises believe in three customer service principles:

1. An understanding that each client's situation is different, and that the best financial plans are developed through a customized approach.
2. A commitment to professionalism and the intention to cooperate with clients to develop appropriate goals.
3. A recognition of each client's stage of life, such as buying a first home, financing children's college or planning for retirement. Measuring progress is also critical, as is adjusting goals as needs and circumstances change.



Kayla B. Davis, CPA, High Country Tax & Consulting; and Jeff Davis, Financial Advisor, High Country Wealth Management

Dependable Technology

Jeff and Kayla each had SkyLine/SkyBest service prior to moving to their current, shared location in Banner Elk. Both companies enjoy fiber-based broadband, telephone and SkyBest TV services at this office.

Brent Keith, Strategic Sales Supervisor, says, "We really enjoy working with Jeff and Kayla and are proud to provide their communications services as they grow their businesses. Working with partners like High Country Wealth Management and High Country Tax & Consulting, who understand the importance of community engagement, falls right in line with SkyLine/SkyBest's strong commitment to the communities we serve. It's who we are."

“For both our businesses, it's imperative to have dependable, high-speed internet access, and SkyLine/SkyBest provides it perfectly.”

- Jeff Davis, Owner and Independent Financial Advisor, High Country Wealth Management

Jeff notes that "it took some doing" on the part of SkyLine/SkyBest to make things work between the two businesses. "During the integration," says Kayla, "the technicians responded promptly, and it was a seamless process. That was a busy time, but they made the transition painless." In preparation, the two agree that SkyLine/SkyBest representatives were very helpful in determining the best solution and the best products for their unique situation.

The shared location has a key system and lines, as well as broadband service. Kayla says, "It all works smoothly together." Jeff adds, "For both our businesses, it's imperative to have dependable, high-speed internet access, and SkyLine/SkyBest provides it perfectly." In addition, the two can work from virtually anywhere in the world and have the phone lines forwarded to their location. This feature gives them flexibility in their quickly growing businesses.

The Davises haven't experienced any major interruptions in their service from SkyLine/SkyBest, either at the current location or their prior ones. Jeff recalls, "In the four-plus years I've dealt with SkyLine/SkyBest, I've had a service interruption one time, and there was a tech support person at my office that same day. It's critical to have that confidence, because when you're dealing with people's money, there's no margin for error."