



BESPOKE

— capital advisors of —

RAYMOND JAMES



## Tailor-made for this

The challenges Cody Hilbun has overcome have only sharpened his focus and drive to help business owners make the most of their life's work.

Photos courtesy of Mark Steffey Photography

**G**rowing up in humble surroundings in middle Georgia, Cody Hilbun never imagined himself collaborating with investment bankers on business sales worth millions of dollars, or ending up on the Forbes Top Next-Generation Wealth Advisors list. Yet here he is at age 33, seven years after passing the Series 7, a founding partner of Bespoke Capital Advisors of Raymond James with all of the above, plus a full roster of business owner clients.

How he got here is a story of grit and gratitude.

It begins with watching his parents make sacrifices to help him become the first person in his family to go to college: a father who never took a vacation, a mother who cleaned houses on weekends to make ends meet. He matched their determination in his studies, and his passion for reading and learning made him a standout student.

In sixth grade came a fateful winning moment: the SIFMA Foundation's Stock Market Game. "My team's stock picks made \$767,000 in 10 months, and we won in our region and state. I thought, this is easy." This was his first lesson in the value of diversity. "What enabled us to win was the industrial and manufacturing holdings."

## READING RENEGADE

Cody read all the books about investing and the markets that he could get his hands on, and landed a mentorship with a local stockbroker. His competitive streak also spurred him to join the wrestling team in high school. This would ultimately help him earn an athletic scholarship to the University of Oklahoma, where he met fellow collegiate wrestler Max Dean, his future business partner. But it also led to a dark period in his family's history.

One night, as Cody's parents and younger sister drove home from one of his high school wrestling tournaments, a drunk driver hit their car, seriously injuring his sister. After two months in the intensive care unit, she recovered. But the hospital bills were so burdensome, Cody's family was forced to file for bankruptcy.

Reflecting on this twist of fate further opened Cody's eyes to the value of financial planning. He continued on his path, working hard and earning his finance degree. Then another cruel twist of fate: graduating in the middle of the Great Recession.

He found work in management and sales. But finance remained his passion. In 2011, he was finally ready to make the leap, training as a financial advisor with

Morgan Keegan months before the firm was acquired by Raymond James.

## AHA MOMENT

As he began building a book of business his first year as an advisor, he was fortunate to gain a client who wanted to sell a pharmacy. "It was through that experience that I realized there's so much to know about getting a business ready for sale, estate and tax planning aspects, and how it changes family dynamics," he says.

A couple of years later, another local business owner client came to him. He told Cody he was looking to sell the business he had started with \$5,000 decades ago. The client said: "I know my business has value to it, but I don't know what the value is." So Cody called the Raymond James Investment Banking team to help with valuation and preparing for a sale. The client cared about his employees and wanted to make sure his business was in good hands. "It was important to him to generate money in the sale, but also that his legacy was preserved," says

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– CODY HILBUN

Brian McDermott, a managing director with Raymond James Investment Banking. "We found a buyer who achieved both of those objectives."

"It was a very successful transaction of about \$40 million," Cody says, "and we enjoyed working on it." So he and Max, who has a background in investment banking, decided to go for it. "I said, 'It's a huge risk, but let's just work with business owners, and everything else, let's say no to.'" They changed their marketing, website and overall messaging to focus on their expertise in serving entrepreneurs.

When meeting with centers of influence, they spend most of the time talking about who they don't work with, and offering even more nuance about their ideal type of client: "We appreciate someone self-made, whose life hasn't always been easy. Someone family-oriented and

thinking about the next generation.” In other words, the right combination of grit and gratitude.

### ‘A DAY TO WORK ON YOU’

Aside from the firm’s investment banking expertise, the team at Bespoke Capital Advisors also takes advantage of By Invitation Only visits. Each visit to headquarters helps demonstrate to entrepreneurs the depth of resources available to help them reach their goals.

It’s also a chance for development. “The BIO visit makes you a better advisor,” Cody says. As his clients meet with the firm’s experts in trust planning, charitable giving and other specialties, he’s along for the ride, soaking up knowledge that pushes his curiosity further. Cody tells clients that “it’s an opportunity to spend a day and work on you.” This resonates with his hardworking clientele, who have sacrificed personal needs in running a business.

A recent example of a client who benefited from a BIO visit was a business owner who also had a child with special needs. During her trip to the home office, she met with Will Lucius of Raymond James Trust, who helped guide

her in how to set up a special needs trust for her child. She also met with experts in charitable giving and investment banking as she prepared to sell her business and use a portion of the proceeds to benefit her favorite charities.

“It’s an honor to be a part of a story like that. She’s pursued her passion and now she’s being rewarded; it’s going to change her and her family’s life,” Cody says of his client’s upcoming plans to sell her business.

### MIXING FUN AND FINANCE


If there’s one thing you should know about Bespoke Capital Advisors, it’s this: This team has fun. There’s Max, a fellow University of Oklahoma alum whom Cody has known for years. They’re so close they’ve coordinated their dogs’ names: Boomer and Sooner, after the school’s fight song. Then there’s Don Milich, a 34-year industry veteran whom Cody considers a mentor. “His best advice to me was, ‘Don’t be afraid to go after the big fish.’” And there’s Laurie Jo Sowada, another industry and Raymond James veteran who literally writes both a newsletter and blog on how to be an effective branch associate, and holds the title of investment portfolio associate. Her

daughter, Taylor, has recently come on board as well to help the office run smoothly. Rounding out the team are advisors Tyler Askey and Christopher Stokes. The team most recently held its first annual Bespoke off-site meeting at Lake Burton.

Cody says they’ve been intentional about making their office an inviting place for clients and staff. They unveiled their new space to clients this October alongside their families. “It’s a fun coffeehouse sort of look with a bar and open ceilings. It’s warm.”

They also use video often in client meetings, as well as a whiteboard wall to make the conversation interactive. “People come in with all this anxiety thinking, ‘Ugh, I’ve got to talk about my finances,’ and we turn it into ‘this is actually kind of fun, we’re working through it together.’”

“Everyone is doing the roles they’re good at and enjoy,” Cody says. “I involve my family in my business as much as possible. ... You work more than any other part of your life. So why not make it fun?”

Cody says he wakes up every morning excited to come to work. And it’s no wonder. After years of persistence and perseverance, he’s found a role that challenges him, a team that feels like extended family, and clients whose mission inspires him. 

## Community champion

Cody serves on numerous boards in the Atlanta area, including CEO Netweavers, Sweetwater Mission and Hope House. He also helped found a chapter of Wrestlers in Business, supporting student athletes during school and post-graduation.



The Bespoke Capital Advisors team knows how to have fun. An off-site meeting was held at Lake Burton in Georgia. Pictured above (L-R): Cody Hilbun, Max Dean, Taylor Sowada and Laurie Jo Sowada.



**CODY HILBUN, AAMS®, WMS®**  
*First Vice President, Investments*

Bespoke Capital Advisors  
of Raymond James

## Finer points

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**WHAT ARE YOUR SPORTS ALLEGIANCES?** In order: the Oklahoma Sooners, Atlanta United, Atlanta Falcons and the Atlanta Braves

**WHAT IS YOUR FAVORITE DESTINATION FOR A THREE-DAY WEEKEND?** Seaside, Florida

**WHAT BOOK ARE YOU CURRENTLY READING?** “The Ride of a Lifetime” by Robert Iger

**WHAT’S THE FIRST THING YOU DO AFTER A LONG WORKWEEK?** Get in comfortable clothes, order in food and rent a movie on Amazon Prime to watch with the family.

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