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**Dec 18 2025**

**SC Court of Appeals**

**EXHIBIT A**

STATE OF SOUTH CAROLINA  
COUNTY OF GREENVILLE

WCM Global Wealth, LLC,

Plaintiff,

vs.

Andrew J. Jaeger and SLP Advisory, LLC,

Defendants.

IN THE COURT OF COMMON PLEAS  
THIRTEENTH JUDICIAL CIRCUIT

C/A#: 2023-CP-23-03724

**ORDER**

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This matter is before the Court on two motions to compel discovery filed by Plaintiff WCM Global Wealth, LLC (hereinafter “WCM” or “Plaintiff”). The first motion, filed November 8, 2023, relates to discovery served December 15, 2023 (the “First Motion”). The second motion, filed December 30, 2024, relates to discovery served October 1, 2024 (the “Second Motion”). Both Motions were heard before the Honorable William C. McMaster on January 30, 2025. At that hearing, Jordan Crapps appeared on behalf of the Plaintiff and Edward Pritchard appeared on behalf of Defendants. At the Hearing, Defendants Andrew J. Jaeger and SLP Advisory, LLC were instructed to provide Plaintiff a privilege log and any responsive documents within ten (10) days and, then, the Parties were to report back to the Court if any issues related to either Motion remained outstanding.

On March 24, 2025, Defendants provided privilege logs related to communications between Defendants and two of Defendants’ former clients – Ronald Evans and Rom Kellis. Two days later, on March 26, 2025, Defendants provided supplemental discovery responses and sixty (60) pages of redacted communications between Mr. Jaeger and Ronald Evans. Based on

communications with the Parties following the Hearing, the Court instructed the parties to advise the Court on the remaining discovery issues by Friday, April 4, 2025 at 5:00 PM. Plaintiff submitted a timely Supplemental Memorandum in response to the Court's Request (the "Supplemental Memorandum").

### **FINDINGS OF FACT AND CONCLUSIONS OF LAW**

#### **1. Defendants are Ordered to fully and completely respond to the Requests identified as Item (a) and Item (b) as detailed in Plaintiff's Supplemental Memorandum.**

Plaintiff issued the following requests for production to Defendants:

- (a) "For the time period July 1, 2022 through present, produce any and all Communications, notes of communications, Electronically Stored Information, or other Documents consisting of or related to communication by, between or among Defendants and any person (or persons) identified by Andrew Jaeger in response to Plaintiffs' Interrogatory number three related to (1) WCM Global Wealth, LLC or any employee, agent or representative thereof, (2) Erik Weir, (3) Edisto River Investors, LLC, (4) SC Strategic Opportunity Fund, LLC, SC Strategic Opportunity Fund II, LLC, (5) AV Real Estate Fund, LLC, (6) any other investment, opportunity, or fund offered by WCM Global Wealth, LLC and/or (7) any investment position held by the person identified or advice or analysis regarding other potential investment positions" (Plaintiff's Supplemental Requests for Production, Request for Production #1); and
- (b) "For the time period July 1, 2022 through present, produce any and all Communications, notes of communications, Electronically Stored Information, or other Documents consisting of or related to communication by, between or among Defendants and any client or former client of WCM Global Wealth, LLC." (Plaintiff's Supplemental Requests for Production, Request for Production #2)

To date, Defendants have only provided privilege logs and redacted documents related to communications between Defendants and two former clients: Rom Kellis and Ronald Evans which were also identified as witnesses in response to Interrogatories. However, Supplemental Request #2 requests communications with any client or former client of WCM Global Wealth – not just Rom Kellis and Ronald Evans. While Rom Kellis and Ronald Evans are former clients and, therefore, their communications would be responsive to Supplemental Request #2, requests (a)

and (b) are not so limited. There is no basis for Defendants' unilateral restriction of responsive documents to Rom Kellis and Ronald Evans. Therefore, it is hereby ordered that Defendants provide full and complete responses and produce all documents responsive to requests (a) and (b) above including, but not limited to, Communications, notes of Communications, and Electronically Stored Information by, between or among the Defendants and “**any** client or former client of WCM Global Wealth.”

**2. Defendants are Ordered to submit for in camera review certain requested Communications and Documents.**

In their Privilege Log, Defendants have asserted the Work Product Doctrine, Common Interest Privilege, and/or Attorney Client Privilege protections for approximately 70 communications between Ron Evans and Andrew Jaeger and five communications involving Mr. Kellis and Andrew Jaeger. At the Hearing and in its Supplemental Memorandum, Plaintiff has challenged the appropriateness of these claims of privilege. To determine the appropriateness of Defendants' claims of privilege, Defendants are hereby ordered to produce all documents and communications, without redaction, by and between Defendants and Ron Evans and Defendants and Rom Kellis to the Court for *in camera* inspection. (See, Rule 26, SCRPC, Notes to 1996 Amendments, “A motion challenging the claim of privilege or work product normally is decided by the court after an *in camera* inspection of the materials.”).

**3. Defendants are Ordered to produce communications with Kenyon Wells as follows**

In this case, and in addition to the relevant requests above, Plaintiff has requested:

“Any and all communications with Kenyon Wells regarding or related to WCM Global Wealth LLC or any employee agent or representative thereof, Erik Weir, Edisto River Investors, LLC, SC Strategic Opportunity Fund, LLC, SC Strategic Opportunity Fund II, LLC, and/or AV Real Estate Fund, LLC”

(Plaintiff's Initial Requests for Production, Request for Production #7). Defendants have responded, "to the extent it seeks communications with Kenyon Wells on the grounds that such communications are subject to the attorney-client privileges as held by the Court in *WCM Global Wealth, LLC v. Andrew J. Jaeger* [sic.] and *SLP Advisory, LLC*, Civil Action No. 2024-CP-32-00178."

The context of Defendants' response is as follows. On December 15, 2023, Plaintiff issued a subpoena in this case to the law firm of Bland Richter, LLP in Lexington County for Bland Richter's communications with Andrew Jaeger. Specifically, the subpoena requested "All communications, documents, tangible things, and electronically stored information exchanged or communicated between, to, from, copying, or otherwise involving Andrew Jaeger and/or SLP Advisory, LLC regarding or related to WCM Global Wealth, LLC or any employee, officer, agent, or client thereof." Bland Richter did not represent Andrew Jaeger but did represent a former client, Kenyon Wells, who had initiated litigation against Plaintiff with the known and admitted assistance of Andrew Jaeger.

Bland Richter and Kenyon Wells moved to quash the subpoena based on a narrow line of cases that held that inclusion of agents of the client, such as an interpreter, in otherwise attorney client privileged communications does not waive attorney client privilege if the agent was necessary to effectively communicate with the lawyer. Eric Bland submitted an affidavit stating that his communications with Andrew Jaeger always included Kenyon Wells and that "such communication was necessary to facilitate an accurate and complete consultation regarding the Wellses' past investments and overall financial picture and it was necessary for us to competently represent the Wellses and REAL, LLC." (Bland Richter's Motion (with its Exhibits) and Kenyon Wells' Memorandum are attached as Exhibit F to Plaintiff's Supplemental Memorandum). The

Honorable Debra R. McCaslin agreed and held that communications between Andrew Jaeger and Bland Richter made in furtherance of Bland Richter's representation of Kenyon Wells fell within the attorney client privilege of Kenyon Wells' and Bland Richter's attorney-client relationship. (The "Lexington County Order" which is attached as Exhibit G to Plaintiff's Supplemental Memorandum).

For purposes of these Motions, Plaintiff concedes that it does not seek and has communicated to Defendants and the Court that it does not seek communications between Andrew Jaeger and Bland Richter, LLP that copy Kenyon Wells and were communicated in furtherance of Bland Richter's representation of Kenyon Wells. However, neither the Lexington County Order nor any privilege law, supports Defendants' current position that all other communications between Andrew Jaeger and Kenyon Wells that do not involve Bland Richter, LLP are privileged. The requested communications and documents (as limited by Plaintiff) are not privileged.

Defendants are hereby ordered to produce any and all communications with Kenyon Wells regarding or related to WCM Global Wealth LLC or any employee agent or representative thereof, Erik Weir, Edisto River Investors, LLC, SC Strategic Opportunity Fund, LLC, SC Strategic Opportunity Fund II, LLC, and/or AV Real Estate Fund, LLC except for those communications between Andrew Jaeger and Bland Richter, LLP that copy Kenyon Wells.

### **CONCLUSION**

THEREFORE, IT IS HEREBY ORDERED that, as detailed above:

1. Within fourteen (14) days of this Order, Defendants shall provide full and complete responses and produce all documents responsive to requests Item (a) and Item (b) detailed above;

2. Defendants are to produce to the Court within fourteen (14) days of this Order all documents and communications between Andrew Jaeger and Ron Evans and Rom Kellis for *in camera* inspection;
3. Defendants are to produce within fourteen (14) days of this Order all documents and communications between Andrew Jaeger and Kenyon Wells that do not include Bland Richter, LLP; and
4. This Court shall retain jurisdiction over the production of documents as set forth herein.

*(Judge's Electronic Signature to Follow)*



Greenville Common Pleas

**Case Caption:** WCM Global Wealth LLC vs. Andrew J Jaeger , defendant, et al

**Case Number:** 2023CP2303724

**Type:** Order/Compel

So Ordered

William C. McMaster, III