



CONNECTICUT WEALTH MANAGEMENT, LLC

A REGISTERED INVESTMENT ADVISOR

Form ADV Part 2B – Individual Disclosure Brochure

for

Kevin C. Leahy, CPA, CFP®
Chief Executive Officer
CRD No: 4245603

Effective: June 1, 2015

This Brochure Supplement provides information about the background and qualifications of Kevin C. Leahy and is a supplement to the Connecticut Wealth Management, LLC (“CTWM”) Form ADV Part 2A – Disclosure Brochure. If you would like a copy of our Form ADV Part 2A – Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement please contact Monique Tardif, CTWM’s Compliance Manager, at (860) 470-0384.

Additional information about Kevin C. Leahy is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Connecticut Wealth Management, LLC
281 Farmington Avenue
Farmington, CT 06032-1911
Phone: (860) 470-0290 * Fax: (860) 470-0289
www.CTWealthMgmt.com
CRD No: 154310

Item 2 – Educational Background and Business Experience

Kevin C. Leahy is the CEO of CTWM. Kevin C. Leahy, born in 1971, is dedicated to serving the Clients of CTWM.

Kevin C. Leahy earned a Masters of Science degree in Taxation with a concentration in Financial Planning from Northeastern University in 2000. In addition, Kevin C. Leahy earned a Bachelor of Science degree in Accounting from Providence College in 1993.

Kevin C. Leahy holds the below designation:

- CERTIFIED FINANCIAL PLANNER™, CFP®

About the CFP® Designation

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold the CFP® certification. It is recognized in the United States and a number of other countries for:

- Its high standard of professional education
- Stringent code of conduct and standards of practice, and
- Ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional
- Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Kevin C. Leahy holds the below designation:

- Certified Public Accountant (“CPA”).

About the Certified Public Accountant (“CPA”) Designation

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include:

- Minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting),
- Minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and
- Successful passage of the Uniform CPA Examination.
- In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA)
- Members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA’s Code of Professional Conduct within their state accountancy laws or have created their own.

Kevin C. Leahy Employment History:

CEO, Connecticut Wealth Management, LLC	10/2010 to Present
Registered Representative, LPL Financial	07/2001 to Present
CEO, KR Wealth Management	01/2009 to 09/2010
Member, KR Wealth Management	01/2007 to 09/2010

Item 3 – Disciplinary Information

Below is the disciplinary information regarding Kevin C. Leahy:

- There are no legal, civil or disciplinary event(s) to disclose.
- There are no regulatory, civil or criminal action(s) to disclose.
- There are no client complaints, lawsuits, arbitration claims or administrative proceedings to disclose.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. As noted above, there are no legal, civil or disciplinary events to disclose.

We encourage you to independently view the background of Kevin C. Leahy on the Investment Adviser Public Disclosure website at:

- Visit <http://www.adviserinfo.sec.gov>
- Select Investment Adviser Search from the left navigation menu
- Select the option for Investment Adviser Representative and enter 4245603 in the field labeled “Individual CRD Number”

Item 4 – Other Business Activities

Broker-Dealer Affiliation

Kevin C. Leahy is a registered representative of LPL Financial of Boston, Massachusetts. LPL Financial is a registered broker-dealer (CRD No. 6413), member FINRA, SIPC. In his separate capacity as a registered representative, Kevin C. Leahy may receive commissions for the implementation of recommendations for commissionable transactions however Clients are not obligated to implement any recommendations. Neither the Advisor nor Kevin C. Leahy will earn investment advisory fees in connection with any services implemented in Kevin C. Leahy's separate capacity as a registered representative where commissions are earned.

Generally, recommendations made to Clients are implemented by Kevin C. Leahy in his role as an Investment Advisor Representative, not in his role as a Registered Representative. As such, Clients of CTWM pay only advisory fees as described above. In no circumstance will CTWM earn an advisory fee and a commission on the same investment. In the event that Kevin C. Leahy earns a commission on an investment, the advisory fee will be waived by CTWM.

Insurance Agency Affiliations

Kevin C. Leahy may serve as a sales agent for various insurance companies. In his separate capacity as an insurance agent, Kevin C. Leahy and may receive customary commissions and other related revenues from the various insurance companies whose products are sold. Commissions generated by insurance sales do not offset regular advisory fees. This may cause a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Kevin C. Leahy.

While the firm is licensed to sell insurance, it is not recommended and implemented by Kevin C. Leahy for all clients. Revenue from insurance commissions represents less than 1% of the advisor's revenue.

Item 5 – Additional Compensation

Kevin C. Leahy is also a registered representative of LPL Financial of Boston, Massachusetts. LPL Financial is a registered broker-dealer (CRD No. 6413), member FINRA, SIPC. In his separate capacity as a registered representative, Kevin C. Leahy may receive commissions for the implementation of recommendations for commissionable transactions.

Item 6 – Supervision

Kevin C. Leahy serves as the CEO and Chief Compliance Officer of CTWM. Kevin C. Leahy can be reached at (860) 470-0290.

CTWM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to Clients of CTWM. Further, CTWM is subject to regulatory oversight by various agencies. These agencies require registration by CTWM and its employees. As a registered entity, CTWM is subject to examinations by regulators, which may be announced or unannounced. CTWM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of each access person employed by CTWM.



CONNECTICUT WEALTH MANAGEMENT, LLC

A REGISTERED INVESTMENT ADVISOR

Form ADV Part 2B – Individual Disclosure Brochure

for

Michael A. Tedone, CPA/PFS
Partner
CRD No: 4414244

Effective: June 1, 2015

This Brochure Supplement provides information about the background and qualifications of Michael A. Tedone and is a supplement to the Connecticut Wealth Management, LLC (“CTWM”) Form ADV Part 2A – Disclosure Brochure. If you would like a copy of our Form ADV Part 2A – Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement please contact Monique Tardif, CTWM’s Compliance Manager, at (860) 470-0384.

Additional information about Michael A. Tedone is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Connecticut Wealth Management, LLC
281 Farmington Avenue
Farmington, CT 06032-1911
Phone: (860) 470-0290 * Fax: (860) 470-0289
www.CTWealthMgmt.com
CRD No: 154310

Item 2 – Educational Background and Business Experience

Michael A. Tedone is a Partner at CTWM. Michael A. Tedone, born in 1959, is dedicated to serving the Clients of CTWM.

Michael A. Tedone earned a Bachelor of Science degree in Business Administration from Bryant College in 1981.

Michael A. Tedone holds the below designation:

- Certified Public Accountant (“CPA”).

About the Certified Public Accountant (“CPA”) Designation

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include:

- Minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting),
- Minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and
- Successful passage of the Uniform CPA Examination.
- In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period).
- Additionally, all American Institute of Certified Public Accountants (AICPA) Members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA’s Code of Professional Conduct within their state accountancy laws or have created their own.

Elizabeth A. DeBassio holds the below designation:

- Personal Financial Specialist (“PFS”).

About the Personal Financial Specialist (“PFS”) Designation

The PFS credential demonstrates that an individual has met the minimum education, experience and testing required of a CPA in addition to a minimum level of expertise in personal financial planning. To attain the PFS credential, a candidate must:

- Hold an unrevoked CPA license, certificate, or permit, none of which are in inactive status;
- Fulfill 3,000 hours of personal financial planning business experience;
- Complete 75 hours of personal financial planning CPE credits;
- Pass a comprehensive financial planning exam;
- Be an active member of the AICPA.

A PFS credential holder is required to adhere to AICPA’s Code of Professional Conduct and the Statement on Standards in Personal Financial Planning Services, when providing personal financial planning services. To maintain their PFS credential, the recipient must complete 60 hours of financial planning CPE credits every three years. The PFS credential is administered through the AICPA.

Michael A. Tedone Employment History:

Partner, Connecticut Wealth Management, LLC	06/2013 to Present
Managing Director, Filomeno Wealth Management, LLC	12/2010 to 05/2013
Chief Compliance Officer, Filomeno Wealth Management, LLC	11/2007 to 12/2010
Investment Adviser Representative, Filomeno Wealth Management, LLC	09/2007 to 05/2013

Item 3 – Disciplinary Information

Below is the disciplinary information regarding Michael A. Tedone:

- There are no legal, civil or disciplinary event(s) to disclose.
- There are no regulatory, civil or criminal action(s) to disclose.
- There are no client complaints, lawsuits, arbitration claims or administrative proceedings to disclose.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. As noted above, there are no legal, civil or disciplinary events to disclose.

We encourage you to independently view the background of Michael A. Tedone on the Investment Adviser Public Disclosure website at:

- Visit <http://www.adviserinfo.sec.gov>
- Select Investment Adviser Search from the left navigation menu
- Select the option for Investment Adviser Representative and enter 4414244 in the field labeled “Individual CRD Number”

Item 4 – Other Business Activities

Michael A. Tedone is dedicated to the investment advisory activities of CTWM’s Clients. He does not have any other business activities.

Item 5 – Additional Compensation

Michael A. Tedone is dedicated to the investment advisory activities of CTWM’s Clients. He does not receive any additional forms of compensation.

Item 6 – Supervision

Michael A. Tedone serves as a Partner at CTWM and is supervised by Kevin C. Leahy, the Chief Compliance Officer. Kevin C. Leahy can be reached at (860) 470-0290.

CTWM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to Clients of CTWM. Further, CTWM is subject to regulatory oversight by various agencies. These agencies require registration by CTWM and its employees. As a registered entity, CTWM is subject to examinations by regulators, which may be announced or unannounced. CTWM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of each access person employed by CTWM.



CONNECTICUT WEALTH MANAGEMENT, LLC

A REGISTERED INVESTMENT ADVISOR

Form ADV Part 2B – Individual Disclosure Brochure

for

Denis M. Horrigan, CFP®
Partner
CRD No: 2214876

Effective: June 1, 2015

This Brochure Supplement provides information about the background and qualifications of Denis M. Horrigan and is a supplement to the Connecticut Wealth Management, LLC (“CTWM”) Form ADV Part 2A – Disclosure Brochure. If you would like a copy of our Form ADV Part 2A – Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement please contact Monique Tardif, CTWM’s Compliance Manager, at (860) 470-0384.

Additional information about Denis M. Horrigan is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

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Farmington, CT 06032-1911
Phone: (860) 470-0290 * Fax: (860) 470-0289
www.CTWealthMgmt.com
CRD No: 154310

Item 2 – Educational Background and Business Experience

Denis M. Horrigan is a Partner at CTWM. Denis M. Horrigan, born in 1967, is dedicated to serving the Clients of CTWM.

Denis M. Horrigan earned a Bachelor of Arts degree in Sociology from Siena College in 1989.

Denis M. Horrigan holds the below designation:

- CERTIFIED FINANCIAL PLANNER™, CFP®

About the CFP® Designation

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The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold the CFP® certification. It is recognized in the United States and a number of other countries for:

- Its high standard of professional education
- Stringent code of conduct and standards of practice, and
- Ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional
- Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Denis M. Horrigan Employment History:

Partner, Connecticut Wealth Management, LLC	01/2011 to Present
Director, Connecticut Wealth Management	10/2010 to 12/2010
Registered Representative, LPL Financial	05/2008 to 09/2013
Director, KR Wealth Management	03/2008 to 09/2010
Vice President of Client Services, St. Germain	03/2006 to 05/2008

Item 3 – Disciplinary Information

Below is the disciplinary information regarding Denis M. Horrigan:

- There are no legal, civil or disciplinary event(s) to disclose.
- There are no regulatory, civil or criminal action(s) to disclose.
- There are no client complaints, lawsuits, arbitration claims or administrative proceedings to disclose.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. As noted above, there are no legal, civil or disciplinary events to disclose.

We encourage you to independently view the background of Denis M. Horrigan on the Investment Adviser Public Disclosure website at:

- Visit <http://www.adviserinfo.sec.gov>
- Select Investment Adviser Search from the left navigation menu
- Select the option for Investment Adviser Representative and enter 2214876 in the field labeled “Individual CRD Number”

Item 4 – Other Business Activities

Denis M. Horrigan is dedicated to the investment advisory activities of CTWM’s Clients. He does not have any other business activities.

Item 5 – Additional Compensation

Denis M. Horrigan is dedicated to the investment advisory activities of CTWM’s Clients. He does not receive any additional forms of compensation.

Item 6 – Supervision

Denis M. Horrigan serves as a Partner at CTWM and is supervised by Kevin C. Leahy, the Chief Compliance Officer. Kevin C. Leahy can be reached at (860) 470-0290.

CTWM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to Clients of CTWM. Further, CTWM is subject to regulatory oversight by various agencies. These agencies require registration by CTWM and its employees. As a registered entity, CTWM is subject to examinations by regulators, which may be announced or unannounced. CTWM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of each access person employed by CTWM.



CONNECTICUT WEALTH MANAGEMENT, LLC

A REGISTERED INVESTMENT ADVISOR

Form ADV Part 2B – Individual Disclosure Brochure

for

Patricia M. Kane, CFP®
Director
CRD No: 5131389

Effective: June 1, 2015

This Brochure Supplement provides information about the background and qualifications of Patricia M. Kane and is a supplement to the Connecticut Wealth Management, LLC (“CTWM”) Form ADV Part 2A – Disclosure Brochure. If you would like a copy of our Form ADV Part 2A – Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement please contact Monique Tardif, CTWM’s Compliance Manager, at (860) 470-0384.

Additional information about Patricia M. Kane is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Connecticut Wealth Management, LLC
281 Farmington Avenue
Farmington, CT 06032-1911
Phone: (860) 470-0290 * Fax: (860) 470-0289
www.CTWealthMgmt.com
CRD No: 154310

Item 2 – Educational Background and Business Experience

Patricia M. Kane is a Director at CTWM. Patricia M. Kane, born in 1958, is dedicated to serving the Clients of CTWM.

Patricia M. Kane earned a Masters of Business Administration degree with a concentration in Finance from the University of Connecticut in 2002. In addition, Patricia M. Kane earned a Bachelor of Science degree in General Studies from the University of Connecticut in 1987.

Patricia M. Kane holds the below designation:

- CERTIFIED FINANCIAL PLANNER™, CFP®

About the CFP® Designation

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold the CFP® certification. It is recognized in the United States and a number of other countries for:

- Its high standard of professional education
- Stringent code of conduct and standards of practice, and
- Ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional
- Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Patricia M. Kane Employment History:

Director, Connecticut Wealth Management, LLC	10/2011 to Present
Senior Financial Advisor, Connecticut Wealth Management, LLC	10/2010 to 10/2011
Registered Representative, LPL Financial	06/2007 to 09/2013
Senior Financial Advisor, KR Wealth Management	01/2010 to 09/2010
Financial Advisor, KR Wealth Management	04/2008 to 01/2010

Item 3 – Disciplinary Information

Below is the disciplinary information regarding Patricia M. Kane:

- There are no legal, civil or disciplinary event(s) to disclose.
- There are no regulatory, civil or criminal action(s) to disclose.
- There are no client complaints, lawsuits, arbitration claims or administrative proceedings to disclose.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. As noted above, there are no legal, civil or disciplinary events to disclose.

We encourage you to independently view the background of Patricia M. Kane on the Investment Adviser Public Disclosure website at:

- Visit <http://www.adviserinfo.sec.gov>
- Select Investment Adviser Search from the left navigation menu
- Select the option for Investment Adviser Representative and enter 5131389 in the field labeled “Individual CRD Number”

Item 4 – Other Business Activities

Patricia M. Kane serves as President of the College Club of Hartford, a non-profit organization. This position requires less than 10% of her time during business hours.

Item 5 – Additional Compensation

Patricia M. Kane is not compensated for her Role as President of the College Club of Hartford.

Item 6 – Supervision

Patricia M. Kane serves as Director at CTWM and is supervised by Kevin C. Leahy, the Chief Compliance Officer. Kevin C. Leahy can be reached at (860) 470-0290.

CTWM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to Clients of CTWM. Further, CTWM is subject to regulatory oversight by various agencies. These agencies require registration by CTWM and its employees. As a registered entity, CTWM is subject to examinations by regulators, which may be announced or unannounced. CTWM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of each access person employed by CTWM.



CONNECTICUT WEALTH MANAGEMENT, LLC

A REGISTERED INVESTMENT ADVISOR

Form ADV Part 2B – Individual Disclosure Brochure

for

Kathleen M. Christensen, CPA/PFS

Director

CRD No: 5344482

Effective: June 1, 2015

This Brochure Supplement provides information about the background and qualifications of Kathleen M. Christensen and is a supplement to the Connecticut Wealth Management, LLC (“CTWM”) Form ADV Part 2A – Disclosure Brochure. If you would like a copy of our Form ADV Part 2A – Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement please contact Monique Tardif, CTWM’s Compliance Manager, at (860) 470-0384.

Additional information about Kathleen M. Christensen is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

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Farmington, CT 06032-1911
Phone: (860) 470-0290 * Fax: (860) 470-0289
www.CTWealthMgmt.com
CRD No: 154310

Item 2 – Educational Background and Business Experience

Kathleen M. Christensen is a Director at CTWM. Kathleen M. Christensen, born in 1964, is dedicated to serving the Clients of CTWM.

Kathleen M. Christensen earned a Masters of Business Administration degree from the University of Hartford in 1993. In addition, Kathleen M. Christensen earned a Bachelor of Science degree in Accounting from Fairfield University in 1986.

Kathleen M. Christensen holds the below designation:

- Certified Public Accountant (“CPA”).

About the Certified Public Accountant (“CPA”) Designation

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include:

- Minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting),
- Minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and
- Successful passage of the Uniform CPA Examination.
- In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period).
- Additionally, all American Institute of Certified Public Accountants (AICPA) Members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA’s Code of Professional Conduct within their state accountancy laws or have created their own.

Elizabeth A. DeBassio holds the below designation:

- Personal Financial Specialist (“PFS”).

About the Personal Financial Specialist (“PFS”) Designation

The PFS credential demonstrates that an individual has met the minimum education, experience and testing required of a CPA in addition to a minimum level of expertise in personal financial planning. To attain the PFS credential, a candidate must:

- Hold an unrevoked CPA license, certificate, or permit, none of which are in inactive status;
- Fulfill 3,000 hours of personal financial planning business experience;
- Complete 75 hours of personal financial planning CPE credits;
- Pass a comprehensive financial planning exam;
- Be an active member of the AICPA.

A PFS credential holder is required to adhere to AICPA’s Code of Professional Conduct and the Statement on Standards in Personal Financial Planning Services, when providing personal financial planning services. To maintain their PFS credential, the recipient must complete 60 hours of financial planning CPE credits every three years. The PFS credential is administered through the AICPA.

Kathleen M. Christensen Employment History:

Director, Connecticut Wealth Management, LLC	06/2013 to Present
Chief Compliance Officer, Filomeno Wealth Management, LLC	11/2007 to 05/2013
Senior Manager, Filomeno & Company	04/2011 to 05/2013
Manager, Filomeno & Company	2008 to 2011

Item 3 – Disciplinary Information

Below is the disciplinary information regarding Kathleen M. Christensen:

- There are no legal, civil or disciplinary event(s) to disclose.
- There are no regulatory, civil or criminal action(s) to disclose.
- There are no client complaints, lawsuits, arbitration claims or administrative proceedings to disclose.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. As noted above, there are no legal, civil or disciplinary events to disclose.

We encourage you to independently view the background of Kathleen M. Christensen on the Investment Adviser Public Disclosure website at:

- Visit <http://www.adviserinfo.sec.gov>
- Select Investment Adviser Search from the left navigation menu
- Select the option for Investment Adviser Representative and enter 5344482 in the field labeled “Individual CRD Number”

Item 4 – Other Business Activities

Kathleen M. Christensen serves as an Auditor for the College Club of Hartford, a non-profit organization. This position requires less than 10% of her time during business hours.

Item 5 – Additional Compensation

Kathleen M. Christensen is not compensated for her Role as an Auditor for the College Club of Hartford.

Item 6 – Supervision

Kathleen M. Christensen serves as Director at CTWM and is supervised by Kevin C. Leahy, the Chief Compliance Officer. Kevin C. Leahy can be reached at (860) 470-0290.

CTWM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to Clients of CTWM. Further, CTWM is subject to regulatory oversight by various agencies. These agencies require registration by CTWM and its employees. As a registered entity, CTWM is subject to examinations by regulators, which may be announced or unannounced. CTWM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of each access person employed by CTWM.



CONNECTICUT WEALTH MANAGEMENT, LLC

A REGISTERED INVESTMENT ADVISOR

Form ADV Part 2B – Individual Disclosure Brochure

for

Jarrett F. Solomon, CFP®, CIMA®

Director

CRD No: 4693541

Effective: June 1, 2015

This Brochure Supplement provides information about the background and qualifications of Jarrett F. Solomon and is a supplement to the Connecticut Wealth Management, LLC (“CTWM”) Form ADV Part 2A – Disclosure Brochure. If you would like a copy of our Form ADV Part 2A – Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement please contact Monique Tardif, CTWM’s Compliance Manager, at (860) 470-0384.

Additional information about Jarrett F. Solomon is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Connecticut Wealth Management, LLC
281 Farmington Avenue
Farmington, CT 06032-1911
Phone: (860) 470-0290 * Fax: (860) 470-0289
www.CTWealthMgmt.com
CRD No: 154310

Item 2 – Educational Background and Business Experience

Jarrett F. Solomon is a Director at CTWM. Jarrett F. Solomon, born in 1980, is dedicated to serving the Clients of CTWM.

Jarrett F. Solomon earned a Bachelor of Arts degree in Economics from Amherst College in 2003.

Jarrett F. Solomon holds the below designation:

- CERTIFIED FINANCIAL PLANNER™, CFP®

About the CFP® Designation

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold the CFP® certification. It is recognized in the United States and a number of other countries for:

- Its high standard of professional education
- Stringent code of conduct and standards of practice, and
- Ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional
- Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Jarrett F. Solomon holds the below designation:

- Certified Investment Management AnalystSM, CIMA[®]

About the CIMA[®] Designation

The CIMA certification signifies that an individual has met initial and ongoing experience, ethical, educational, and examination requirements for investment management consulting, including advanced investment management theory and application.

Prerequisites for the CIMA[®] certification are:

- Three years of financial services experience
- Candidates must pass an online qualification examination
- Complete a one-week classroom education program provided by a registered education provider at an AACSB accredited university business school, and
- Have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements.

CIMA[®] designees are required to adhere to IMCA's Code of Professional Responsibility, Standards of Practice, and Rules and Guidelines for Use of the Marks.

CIMA[®] designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through Investment Management Consultants Association (IMCA). The CIMA[®] certification has earned ANSI[®] (American National Standards Institute) accreditation under the personnel certification program. The American National Standards Institute, or ANSI, is a private non-profit organization that facilitates standardization and conformity assessment activities in the United States. CIMA[®] is the first financial services credential to meet this international standard for personnel certification.

Jarrett F. Solomon Employment History:

Director, Connecticut Wealth Management, LLC	01/2014 to Present
Senior Financial Advisor, Connecticut Wealth Management, LLC	08/2011 to 12/2013
Associate Director, Convergent Wealth Advisors	10/2007 to 05/2011
Senior Analyst, Convergent Wealth Advisors	04/2007 to 10/2007
Senior Analyst, Lydian Wealth Management	09/2005 to 04/2007

Item 3 – Disciplinary Information

Below is the disciplinary information regarding Jarrett F. Solomon:

- There are no legal, civil or disciplinary event(s) to disclose.
- There are no regulatory, civil or criminal action(s) to disclose.
- There are no client complaints, lawsuits, arbitration claims or administrative proceedings to disclose.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. As noted above, there are no legal, civil or disciplinary events to disclose.

We encourage you to independently view the background of Jarrett F. Solomon on the Investment Adviser Public Disclosure website at:

- Visit <http://www.adviserinfo.sec.gov>
- Select Investment Adviser Search from the left navigation menu
- Select the option for Investment Adviser Representative and enter 4693541 in the field labeled "Individual CRD Number"

Connecticut Wealth Management, LLC

281 Farmington Avenue * Farmington, CT 06032-1911

Item 4 – Other Business Activities

Jarrett F. Solomon is dedicated to the investment advisory activities of CTWM's Clients. He does not have any other business activities.

Item 5 – Additional Compensation

Jarrett F. Solomon is dedicated to the investment advisory activities of CTWM's Clients. He does not receive any additional forms of compensation.

Item 6 – Supervision

Jarrett F. Solomon serves as Director at CTWM and is supervised by Kevin C. Leahy, the Chief Compliance Officer. Kevin C. Leahy can be reached at (860) 470-0290.

CTWM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to Clients of CTWM. Further, CTWM is subject to regulatory oversight by various agencies. These agencies require registration by CTWM and its employees. As a registered entity, CTWM is subject to examinations by regulators, which may be announced or unannounced. CTWM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of each access person employed by CTWM.



CONNECTICUT WEALTH MANAGEMENT, LLC

A REGISTERED INVESTMENT ADVISOR

Form ADV Part 2B – Individual Disclosure Brochure

for

Elizabeth A. DeBassio, CPA/PFS
Senior Financial Advisor
CRD No: 5185156

Effective: June 1, 2015

This Brochure Supplement provides information about the background and qualifications of Elizabeth A. DeBassio and is a supplement to the Connecticut Wealth Management, LLC (“CTWM”) Form ADV Part 2A – Disclosure Brochure. If you would like a copy of our Form ADV Part 2A – Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement please contact Monique Tardif, CTWM’s Compliance Manager, at (860) 470-0384.

Additional information about Elizabeth A. DeBassio is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Connecticut Wealth Management, LLC
281 Farmington Avenue
Farmington, CT 06032-1911
Phone: (860) 470-0290 * Fax: (860) 470-0289
www.CTWealthMgmt.com
CRD No: 154310

Item 2 – Educational Background and Business Experience

Elizabeth A. DeBassio is a Senior Financial Advisor at CTWM. Elizabeth A. DeBassio, born in 1973, is dedicated to serving the Clients of CTWM.

Elizabeth A. DeBassio earned a Masters of Personal Financial Planning degree from Bentley College in 2002. In addition, Elizabeth A. DeBassio earned a Bachelor of Arts degree in Economics/Accounting from College of the Holy Cross in 1995.

Elizabeth A. DeBassio holds the below designation:

- Certified Public Accountant (“CPA”).

About the Certified Public Accountant (“CPA”) Designation

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include:

- Minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting),
- Minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and
- Successful passage of the Uniform CPA Examination.
- In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period).
- Additionally, all American Institute of Certified Public Accountants (AICPA) Members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA’s Code of Professional Conduct within their state accountancy laws or have created their own.

Elizabeth A. DeBassio holds the below designation:

- Personal Financial Specialist (“PFS”).

About the Personal Financial Specialist (“PFS”) Designation

The PFS credential demonstrates that an individual has met the minimum education, experience and testing required of a CPA in addition to a minimum level of expertise in personal financial planning. To attain the PFS credential, a candidate must:

- Hold an unrevoked CPA license, certificate, or permit, none of which are in inactive status;
- Fulfill 3,000 hours of personal financial planning business experience;
- Complete 75 hours of personal financial planning CPE credits;
- Pass a comprehensive financial planning exam;
- Be an active member of the AICPA.

A PFS credential holder is required to adhere to AICPA’s Code of Professional Conduct and the Statement on Standards in Personal Financial Planning Services, when providing personal financial planning services. To maintain their PFS credential, the recipient must complete 60 hours of financial planning CPE credits every three years. The PFS credential is administered through the AICPA.

Elizabeth A. DeBassio Employment History:

Senior Financial Advisor, Connecticut Wealth Management, LLC	06/2013 to Present
Investment Advisor Representative, Filomeno Wealth Management, LLC	11/2007 to 05/2013
Manager, Filomeno & Company	2008 to 05/2013
Senior Supervisor, Filomeno & Company	2002 to 2008

Item 3 – Disciplinary Information

Below is the disciplinary information regarding Elizabeth A. DeBassio:

- There are no legal, civil or disciplinary event(s) to disclose.
- There are no regulatory, civil or criminal action(s) to disclose.
- There are no client complaints, lawsuits, arbitration claims or administrative proceedings to disclose.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. As noted above, there are no legal, civil or disciplinary events to disclose.

We encourage you to independently view the background of Elizabeth A. DeBassio on the Investment Adviser Public Disclosure website at:

- Visit <http://www.adviserinfo.sec.gov>
- Select Investment Adviser Search from the left navigation menu
- Select the option for Investment Adviser Representative and enter 5185156 in the field labeled “Individual CRD Number”

Item 4 – Other Business Activities

Elizabeth A. DeBassio is dedicated to the investment advisory activities of CTWM’s Clients. She does not have any other business activities.

Item 5 – Additional Compensation

Elizabeth A. DeBassio is dedicated to the investment advisory activities of CTWM’s Clients. She does not receive any additional forms of compensation.

Item 6 – Supervision

Elizabeth A. DeBassio serves as Senior Financial Advisor at CTWM and is supervised by Kevin C. Leahy, the Chief Compliance Officer. Kevin C. Leahy can be reached at (860) 470-0290.

CTWM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to Clients of CTWM. Further, CTWM is subject to regulatory oversight by various agencies. These agencies require registration by CTWM and its employees. As a registered entity, CTWM is subject to examinations by regulators, which may be announced or unannounced. CTWM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of each access person employed by CTWM.



CONNECTICUT WEALTH MANAGEMENT, LLC

A REGISTERED INVESTMENT ADVISOR

Form ADV Part 2B – Individual Disclosure Brochure

for

Kayse A. Kress, CFP®
Senior Financial Advisor
CRD No: 5060633

Effective: June 1, 2015

This Brochure Supplement provides information about the background and qualifications of Kayse A. Kress and is a supplement to the Connecticut Wealth Management, LLC (“CTWM”) Form ADV Part 2A – Disclosure Brochure. If you would like a copy of our Form ADV Part 2A – Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement please contact Monique Tardif, CTWM’s Compliance Manager, at (860) 470-0384.

Additional information about Kayse A. Kress is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Connecticut Wealth Management, LLC
281 Farmington Avenue
Farmington, CT 06032-1911
Phone: (860) 470-0290 * Fax: (860) 470-0289
www.CTWealthMgmt.com
CRD No: 154310

Item 2 – Educational Background and Business Experience

Kayse A. Kress is a Senior Financial Advisor at CTWM. Kayse A. Kress, born in 1984, is dedicated to serving the Clients of CTWM.

Kayse A. Kress earned a Bachelor of Science degree in Marketing from Central Connecticut State University in 2006.

Kayse A. Kress holds the below designation:

- CERTIFIED FINANCIAL PLANNER™, CFP®

About the CFP® Designation

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold the CFP® certification. It is recognized in the United States and a number of other countries for:

- Its high standard of professional education
- Stringent code of conduct and standards of practice, and
- Ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional
- Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Kayse A. Kress Employment History:

Senior Financial Advisor, Connecticut Wealth Management, LLC	10/2010 to Present
Registered Representative, LPL Financial	01/2010 to 12/2011
Financial Advisor, KR Wealth Management	01/2010 to 09/2010
Client Service Associate, KR Wealth Management	09/2005 to 01/2010

Item 3 – Disciplinary Information

Below is the disciplinary information regarding Kayse A. Kress:

- There are no legal, civil or disciplinary event(s) to disclose.
- There are no regulatory, civil or criminal action(s) to disclose.
- There are no client complaints, lawsuits, arbitration claims or administrative proceedings to disclose.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. As noted above, there are no legal, civil or disciplinary events to disclose.

We encourage you to independently view the background of Kayse A. Kress on the Investment Adviser Public Disclosure website at:

- Visit <http://www.adviserinfo.sec.gov>
- Select Investment Adviser Search from the left navigation menu
- Select the option for Investment Adviser Representative and enter 5060633 in the field labeled “Individual CRD Number”

Item 4 – Other Business Activities

Kayse A. Kress serves on the Investment Committee of the Chrysalis Center, Inc., a non-profit organization. This position requires less than 10% of her time during business hours.

Item 5 – Additional Compensation

Kayse A. Kress is not compensated for her position on the Investment Committee with Chrysalis Center, Inc.

Item 6 – Supervision

Kayse A. Kress serves as a Senior Financial Advisor at CTWM and is supervised by Kevin C. Leahy, the Chief Compliance Officer. Kevin C. Leahy can be reached at (860) 470-0290.

CTWM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to Clients of CTWM. Further, CTWM is subject to regulatory oversight by various agencies. These agencies require registration by CTWM and its employees. As a registered entity, CTWM is subject to examinations by regulators, which may be announced or unannounced. CTWM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of each access person employed by CTWM.



CONNECTICUT WEALTH MANAGEMENT, LLC

A REGISTERED INVESTMENT ADVISOR

Form ADV Part 2B – Individual Disclosure Brochure

for

Ryan P. Tuttle, CFP®
Senior Financial Advisor
CRD No: 5013022

Effective: June 1, 2015

This Brochure Supplement provides information about the background and qualifications of Ryan P. Tuttle and is a supplement to the Connecticut Wealth Management, LLC (“CTWM”) Form ADV Part 2A – Disclosure Brochure. If you would like a copy of our Form ADV Part 2A – Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement please contact Monique Tardif, CTWM’s Compliance Manager, at (860) 470-0384.

Additional information about Ryan P. Tuttle is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Connecticut Wealth Management, LLC
281 Farmington Avenue
Farmington, CT 06032-1911
Phone: (860) 470-0290 * Fax: (860) 470-0289
www.CTWealthMgmt.com
CRD No: 154310

Item 2 – Educational Background and Business Experience

Ryan P. Tuttle is a Senior Financial Advisor at CTWM. Ryan P. Tuttle, born in 1984, is dedicated to serving the Clients of CTWM.

Ryan P. Tuttle earned a Bachelor of Science degree in Business Administration with a concentration in Finance from the University of Connecticut in 2006.

Ryan P. Tuttle holds the below designation:

- CERTIFIED FINANCIAL PLANNER™, CFP®

About the CFP® Designation

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold the CFP® certification. It is recognized in the United States and a number of other countries for:

- Its high standard of professional education
- Stringent code of conduct and standards of practice, and
- Ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional
- Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Ryan P. Tuttle Employment History:

Senior Financial Advisor, Connecticut Wealth Management, LLC	10/2010 to Present
Registered Representative, LPL Financial	01/2010 to 12/2011
Financial Advisor, KR Wealth Management	01/2010 to 09/2010
Client Service Associate, KR Wealth Management	06/2005 to 01/2010

Item 3 – Disciplinary Information

Below is the disciplinary information regarding Ryan P. Tuttle:

- There are no legal, civil or disciplinary event(s) to disclose.
- There are no regulatory, civil or criminal action(s) to disclose.
- There are no client complaints, lawsuits, arbitration claims or administrative proceedings to disclose.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. As noted above, there are no legal, civil or disciplinary events to disclose.

We encourage you to independently view the background of Ryan P. Tuttle on the Investment Adviser Public Disclosure website at:

- Visit <http://www.adviserinfo.sec.gov>
- Select Investment Adviser Search from the left navigation menu
- Select the option for Investment Adviser Representative and enter 5013022 in the field labeled “Individual CRD Number”

Item 4 – Other Business Activities

Ryan P. Tuttle is dedicated to the investment advisory activities of CTWM’s Clients. He does not have any other business activities.

Item 5 – Additional Compensation

Ryan P. Tuttle is dedicated to the investment advisory activities of CTWM’s Clients. He does not receive any additional forms of compensation.

Item 6 – Supervision

Ryan P. Tuttle serves as a Senior Financial Advisor at CTWM and is supervised by Kevin C. Leahy, the Chief Compliance Officer. Kevin C. Leahy can be reached at (860) 470-0290.

CTWM has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to Clients of CTWM. Further, CTWM is subject to regulatory oversight by various agencies. These agencies require registration by CTWM and its employees. As a registered entity, CTWM is subject to examinations by regulators, which may be announced or unannounced. CTWM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of each access person employed by CTWM.