

**Part 2B of Form ADV: *Brochure Supplement***

**Michael Gary Holt**

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This brochure supplement provides information about Michael Gary Holt that supplements the Asset Strategies Management, Inc. brochure. You should have received a copy of that brochure. Please contact Michael Holt if you did not receive Asset Strategies Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Michael Gary Holt is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

## **Item 2 Educational, Background and Business Experience**

**Full Legal Name:** Michael Gary Holt      **Born:** 1962

### **Education**

- North Dakota State College; BS, Business Administration; 1984

### **Business Experience**

- Asset Strategies and Management, Inc.; President; from 04/1984 to Present

## **Item 3 Disciplinary Information**

Michael Gary Holt has no reportable disciplinary history.

## **Item 4 Other Business Activities**

### **A. Investment-Related Activities**

1. Michael Gary Holt is not engaged in any other investment-related activities.

2. Michael Gary Holt does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

### **B. Non Investment-Related Activities**

Michael Gary Holt is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his or her time.

## **Item 5 Additional Compensation**

Michael Gary Holt does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## **Item 6 Supervision**

Michael Gary Holt, is responsible for all supervision and monitoring of investment advice offered to clients. He can be reached at 408-364-9100. While the underlying securities within accounts are continually monitored by Mr. Holt reviews these accounts at least quarterly. Accounts are reviewed in the context of each client's stated investment objectives and guidelines. More frequent reviews may be triggered by material changes in variables such as the client's individual circumstances, or the market, political or economic environment.

## **Item 7 Requirements for State-Registered Advisers**

Michael Gary Holt has never been the subject of a bankruptcy petition nor has he ever been involved in any of the following events:

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
  - (a) an investment or an investment-related business or activity;
  - (b) fraud, false statement(s), or omissions;
  - (c) theft, embezzlement, or other wrongful taking of property;
  - (d) bribery, forgery, counterfeiting, or extortion; or
  - (e) dishonest, unfair, or unethical practices.
  
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
  - (a) an investment or an investment-related business or activity;
  - (b) fraud, false statement(s), or omissions;
  - (c) theft, embezzlement, or other wrongful taking of property;
  - (d) bribery, forgery, counterfeiting, or extortion; or
  - (e) dishonest, unfair, or unethical practices.