

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

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This brochure supplement provides information about Walt Sokira that supplements the WALT ST Investment Management (WSIM) brochure. You should have received a copy of that brochure. Please contact Walt Sokira, Chief Compliance Officer, at 330-677-1950 if you did not receive WALT ST Investment Management's brochure or if you have any questions about the contents of this supplement.

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

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

Walt Sokira was born in 1965.

#### **Educational Background:**

Kent State University, MBA, 1991

#### **Business Experience:**

1998 to Current: Chief Investment Officer – WALT ST Investment Management, Ltd.

2011 to Current: Publisher – Focused Stock Research, LLC.

2006 to Present – Part-Time Adjunct Faculty - Case Western Reserve University  
Weatherhead School of Management

2006 to 2008 - Kent State University (Kent,OH), Adjunct Faculty

1993 to 1998 - NatCity Investments, Inc., Akron, OH, Broker Dealer, Registered Representative,

1992 to 1993 - Dean Witter, Akron, OH, Broker Dealer, Registered Representative

1985 to 1992 - National City Bank, Akron, OH, Bank, Portfolio Manager

### **Item 3 Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. There is no information that is applicable to this Item.

#### **Item 4 Other Business Activities**

Registered investment advisers are required to disclose all material facts regarding engagement of a supervised person in any other investment-related business or any business activity that occupies a significant portion of that person's time.

Walt Sokira is the publisher and contributor a general investment research and investment education website known as Focused Stock Research. Walt Sokira spends approximately 10% of his time in his leadership and management of the firm.

#### **Item 5 Additional Compensation**

Registered investment advisers are required to disclose if someone who is not a client provides additional compensation to its supervised persons for providing advisory services. There is no information that is applicable to this Item.

#### **Item 6 Supervision**

Investment advice provided to clients is determined by the Portfolio Management Team, of which Mr. Sokira is a member and Chief Investment Officer. The team meets at least weekly to discuss market perspectives, securities research and investment strategy. As President and Chief Investment Officer, Mr. Sokira is not directly supervised. However, Jennifer Sokira, President, is responsible for reviewing investment advice provided to clients by Mr. Stack. All investments made on behalf of clients, including those directed by Mr. Sokira, are reviewed quarterly as part of the compliance monitoring process. Mrs. Jennifer Sokira can be reached at 330-677-1950.