

Firm Brochure (Part 2A of Form ADV)

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This brochure provides information about the qualifications and business practices of Advisory Wealth Management Services. If you have any questions about the contents of this brochure, please contact us at the telephone number or email address indicated above. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Advisory Wealth Management Services also is available on the SEC's website at www.adviserinfo.sec.gov.

Date: January 5, 2011

Material Changes

The Material Changes section of this brochure will be updated annually when material changes occur since the previous release of the Firm Brochure.

Material Changes since the last update: The U.S. Securities and Exchange Commission issued a final rule in July 2010 requiring advisers to provide a Firm Brochure in narrative “plain English” format. The new final rule specifies mandatory sections and organization.

Whenever you would like to receive a complete copy of our Firm Brochure, please contact us by telephone at: 973-801-9501 or by email at: chris@advisorywms.com.

Material Changes for the period beginning January 2012

Advisory Wealth Management Services, LLC will be applying for registration with the State of New Jersey in compliance with the Dodd-Frank Act, and once registration is accepted, will withdraw registration from the Securities and Exchange Commission.

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Advisory Business

Advisory Wealth Management Services is a full service investment advisory firm providing investment advice to a variety of clients. We have been in business since April of 2006. Our objective is to provide you, our clients with up to the minute, and accurate financial advice to meet your goals and objectives. Prior to April of 2006, the two principal owners of the firm, Christopher Stanziale and Carolyn Stanziale have been in the financial planning, investment advisory industry since 1986. Both Christopher and Carolyn have an extensive background in the financial services area. Christopher has owned and operated financial businesses prior to 1987. Carolyn has been the Chief Compliance Officer and owner beginning in 2001. Advisory Wealth Management Services is a small two person firm with a small client base. This allows us to provide our clients with a personal touch that they may not be able to obtain in a larger company. The majority of our clients have been with us for over twenty five years.

Our services are tailored to the individual needs of our clients and your investment advisor knows the potential and risk involved in different investments. Many products are not widely known among the general public. If you already have investments, Advisory Wealth Management Services will evaluate your portfolio and consider changes when they are in your best interest. Your investment strategy will then be implemented only with your knowledge and approval. When necessary, Advisory Wealth Management Services will work with your other advisors in order to provide you with the utmost expertise in all fields so that you will feel confident and secure in the advice that you will receive.

Our investment advisory services are designed to construct portfolios that will generate the highest returns possible while always taking into consideration the client's risk tolerance. However, each client will always have the opportunity to place reasonable restrictions on the types of investments to be held in a portfolio. Advisory Wealth Management Services will provide continuous monitoring and updating to ensure that your investments always remain within your risk tolerance. As of December 31, 2010 Advisory Wealth Management Services manages approximately \$32,000,000 of client's assets on a discretionary basis and \$0 on a non-discretionary basis.

Retirement planning and estate planning are two of the many important issues that Advisory Wealth Management Services focuses on. Every client wants to obtain financial independence during retirement. Advisory Wealth Management Services will assist you in developing these goals by using tax laws and investment vehicles and developing a strategy for providing the capital and income needed to accomplish financial independence. Advisory Wealth Management Services is thoroughly familiar with estate laws. Over time these laws change and therefore your Wills may become obsolete and not provide what your original intentions were. Advisory Wealth Management Services will work with your attorney to make sure that your wishes are fulfilled and that there will be adequate income for your family, and sufficient funds to pay estate costs. In order for these processes to meet your desires and needs, there must be constant communication between you our client and Advisory Wealth Management Services relating to any changes in your lifestyles.

Advisory Wealth Management Services also acts as a business manager to certain types of clients that have expressed a desire for this service. This service includes, but is not limited to, arranging mortgages, advising on purchases of property, advising on staffing needs for a client's particular business, in addition to other various business needs and or concerns a client may express at the time of contract.

Fees and Compensation

The fees that Advisory Wealth Management Services charges for our advisory services range from ½ to 1.5% of assets under management, per annum. The fees are billed quarterly. If a client so chooses the fee will be deducted from the client's account. However every client has the choice of whether to be billed directly or have their fees deducted from their assets. All fees are negotiable. The client indicates his choice upon signing their Investment Advisory Contract with Advisory Wealth Management Services. Clients may pay brokerage and money managers fees which will be discussed in Item 12 of this brochure.

As a general rule our client's quarterly fees are billed in advance. If a client terminates prior to the end of the billing period, a portion of the fee will be returned. At termination, fees will be adjusted on a pro-rata basis for the portion of the quarter completed and earned. The returned fee will be calculated at the time of termination. An example of this would be if a client terminated after one month of services, Advisory Wealth Management Services would refund two months of fee.

Advisory Wealth Management Services is a fee only firm. It does not earn compensation for the sale of securities or other investment products, including asset-based sales charges or service fees from the sale of mutual funds. Therefore, there is no conflict of interest or incentive for Advisory Wealth Management Services to recommend investment products based on the compensation received, rather than on a client's needs.

Advisory Wealth Management Services also earns fees for the service it performs as a Business Manager to certain types of clients. The fee for this service is a negotiated flat fee which is determined at the time of contractual agreement and is based upon the type of services requested.

Performance Based Fees

Sharing of Capital Gains

Fees are NOT based on a share of the capital gains or capital appreciation of managed securities.

Advisory Wealth Management Services does not use a performance-based fee structure because of the potential conflict of interest. Performance-based compensation may create an incentive for the adviser to recommend an investment that may carry a higher degree of risk to the client.

Types of Clients

Advisory Wealth Management Services provides investment advice mainly to individuals, estates, trusts, charitable organizations and pension and profit sharing plans. Presently, unless a long time client refers Advisory Wealth Management Services to a relative or close friend we will review that person's situation and make a decision as to whether we will take on that client or refer them to another Investment Advisory Financial Planning firm. In general, at this time, we are not accepting new clients.

Methods of Analysis, Investment Strategies, and Risk of Loss

Methods of Analysis

Security analysis methods may include charting, technical analysis, and cyclical analysis. The main source of information include financial newspapers and magazines, inspections of corporate activities, research materials prepared by others, filings with Securities and Exchange Commission and company press releases.

Other sources of information that Advisory Wealth Management Services may use include Morningstar Principia mutual fund information, Morningstar Principia stock information, and Charles Schwab & Company's "SchwabLink" service.

Investment Strategies

Advisory Wealth Management Services' Portfolio Management and Tracking systems affords our clients the ability to invest across a broad range of asset classes and provides for the monitoring of those investments.

The investment philosophy of Advisory Wealth Management Services implements the principles of using a diversified portfolio which seeks to mitigate the investment risk associated with particular asset classes. Using asset classes which tend to perform differently in similar markets can act to limit the overall risk of a portfolio. Models are constructed which have differing degrees of risk. The appropriate model for each client will differ based on many factors. Some of the factors involved are, investment horizon, a client's risk tolerance, age, or their current financial situation.

The Investment Manager selections for each asset class are chosen after thorough evaluation by the principle, Chris Stanziale, of Advisory Wealth Management Services. Each current or potential money manager presented to Chris Stanziale must meet certain requirements. Investment Managers must have, at a minimum, a five year history with that asset class. The risk must be within an acceptable range for its asset class. The historical returns must also fall within an acceptable range. The fees charged by the Management Firm must also be within acceptable parameters of the asset class. The Investment Firm must also maintain the investment style which it has been chosen to represent within the portfolio.

Advisory Wealth Management Services acts as an independent advisor on behalf of our client, not the money managers. We will issue recommendations on the inclusion or expulsion of a money manager based on the managers' continued adherence or deviation from the selection criteria.

Advisory Wealth Management Services current models are, in order of risk, Capital Preservation, Conservative, Moderate and Growth. Inclusion or expulsion of asset classes from our model portfolios occurs on at least an annual basis or when market conditions warrant.

The Capital Preservation Model is for the most conservative investor or one who has a need for maximizing their current investment income, while seeking to maintain the value of their portfolio.

The Conservative Model is for investors whose primary goal is current income, but with some need for potential future growth. This strategy utilizes several fixed income asset classes along with some equity exposure, both domestically and international, to help keep pace with inflation.

The Moderate Model is for investors with a time horizon of at least five years. Within this model, an investor would hold a combination of domestic and international stocks and fixed income. Moderate investors are seeking preservation of capital, some income and modest growth potential.

The Growth Model is for investors who are willing to accept a substantial degree of the volatility inherent in equity markets. These investors have a time horizon of greater than five years and will have their assets invested in domestic and international stocks and also might have some fixed income exposure.

All of the investment managers and their specific investment vehicles are subject to ongoing evaluation. If a major change or unacceptable investment performance occurs, a recommendation for a change in managers will result. All portfolios are monitored to ensure that the appropriate asset class allocations are maintained. When necessary the portfolio will be re-balanced accordingly.

Risk of Loss

All investment programs have certain risks that are borne by the investor. Our investment approach constantly keeps the risk of loss in mind. Investors face the following investment risks:

Interest-Rate Risk: Fluctuations in interest rates may cause investment prices to fluctuate. For example, when interest rates rise, yields on existing bonds become less attractive, causing their market values to decline.

Market Risk: The price of a security, bond, or mutual fund may drop in reaction to tangible and intangible events and conditions. This type of risk is caused by external factors independent of a security's particular underlying circumstances. For example, political, economic and social conditions may trigger market events.

Inflation Risk: When any type of inflation is present, a dollar today will not buy as much as a dollar next year, because purchasing power is eroding at the rate of inflation.

Currency Risk: Overseas investments are subject to fluctuations in the value of the dollar against the currency of the investment's originating country. This is also referred to as exchange rate risk.

Reinvestment Risk: This is the risk that future proceeds from investments may have to be reinvested at a potentially lower rate of return, example interest rate. This primarily relates to fixed income securities.

Business Risk: These risks are associated with a particular industry or a particular company within an industry. For example, oil drilling companies depend on finding oil and then refining it, a lengthy process, before they can generate a profit. They carry a higher risk of profitability than an electric company, which generates its income from a steady stream of customers who buy electricity no matter what the economic environment is like.

Liquidity Risk: Liquidity is the ability to readily convert an investment into cash. Generally, assets are more liquid if many traders are interested in a standardized product. For example, Treasury Bills are highly liquid, while real estate properties are not.

Financial Risk: Excessive borrowing to finance a business' operations increases the risk of profitability, because the company must meet the terms of its obligations in good times and bad. During periods of financial stress, the inability to meet loan obligations may result in bankruptcy, and or a declining market value.

Disciplinary Information

Advisory Wealth Management Services and its two owners, Christopher Stanziale and Carolyn Stanziale as a fiduciary has an obligation to disclose to our clients information that may be material regarding any disciplinary information. The firm and its owners have not been involved in legal or disciplinary events related to past or present investment clients.

Other Financial Industry Activities and Affiliations

Advisory Wealth Management Services has NO other activities or arrangements that are material to its advisory or its clients with a related person who is a broker-dealer, investment company, other investment advisor, financial planning firm, accounting firm, law firm, and or insurance company or agency, or any other type of financial entity.

For the purpose of this information, “material” means some type of ownership sharing with Advisory Wealth Management Services.

Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

Code of Ethics

The two principals of Advisory Wealth Management Services have committed to a Code of Ethics that is available for review by clients and prospective clients upon request. The firm will provide a copy of the Code of Ethics to any client or prospective client upon request.

Participation or Interest in Client Transactions

Advisory Wealth Management Services and its two principals buy or sell securities that are also held by clients. They will not trade their own securities ahead of client trades. All provisions of Advisory Wealth Management Services' Compliance Manual are complied with.

Personal Trading

The Chief Compliance Officer, Carolyn Stanziale, reviews any trades made by Advisory Wealth Management Services. As there are no other employees of the firm other than Carolyn and Christopher Stanziale, personal trading does not affect the markets, and there is no issue of preferential treatment. As the trades are small mutual fund trades or exchange-traded fund trades, the trades do not affect the securities markets. Therefore there are no related conflicts in regards to this issue.

Brokerage Practices

Advisory Wealth Management Services, may utilize discretion in determining the securities to be bought or sold and or the amount of the securities to be bought or sold for the client's account if the client has authorized such discretion in the Investment Advisory Management Services Agreement. If the client has not given authorization to the Company to have such discretion, it will provide the client with recommendations and will execute transactions only with the client's prior authorization.

Advisory Wealth Management Services may recommend that clients establish brokerage accounts with the Schwab Institutional division of Charles Schwab & Co., Inc. (Schwab), a registered broker-dealer, member FINRA/SIPC, to maintain custody of clients' assets and to effect trades for their accounts. Advisory Wealth Management Services is independently owned and operated and not affiliated with Schwab. Schwab provides Advisory Wealth Management Services with access to its institutional trading and custody services, which are typically not available to Schwab retail investors. These services generally are available to independent investment advisors on an unsolicited bases, at no charge to them so long as a total of at least \$10 million of the advisor's client's assets is maintained in accounts at Schwab Institutional and is not otherwise contingent upon Advisory Wealth Management Services committing to Schwab any specific amount of business. Schwab's services include brokerage, custody, research and access to mutual funds and other investments that are otherwise generally available only to institutional investors or would require a significantly higher minimum initial investment.

For Advisory Wealth Management Services, clients' accounts maintained in its custody, Schwab generally does not charge separately for custody but is compensated by account holders through commissions or transaction-related fees for securities trades that are executed through Schwab or that settle into Schwab accounts. Advisory Wealth Management Services reviews the execution of trades at Schwab to assure Best Execution.

Schwab also makes available to Advisory Wealth Management Services other products and services that benefit Advisory Wealth Management Services but may not benefit is clients' accounts. Some of these other products and services assist Advisory Wealth Management Services in managing and administering clients' accounts. These include software and other technology that provide access to client account data, such as trade confirmations and account statements, facilitate trade execution and allocation of aggregated trade orders for multiple client accounts, provide research, pricing information and other market data, facilitate payment of Advisory Wealth Management Services fees from its clients' accounts and assist with back-office functions, recordkeeping and client reporting. Schwab Institutional also makes available other services intended to help Advisory Wealth Management Services manage and further develop its business enterprise. These services may include consulting, publications and conferences on practice management, information technology, business succession, regulatory compliance and marketing. In addition, Schwab may make available, arrange and or pay for these types of services rendered to Advisory Wealth Management Services by independent third parties. Schwab Institutional may discount or waive fees it would otherwise charge for some of these services or

pay all or a part of the fees of a third party providing these services to Advisory Wealth Management Services. While as a fiduciary, Advisory Wealth Management Services endeavors to act in its clients' best interest, and may recommend that clients maintain their assets in accounts at Schwab, is not based on any benefit that Advisory Wealth Management Services may receive. The client has the sole authority to choose where they want their assets to be placed.

Review of Accounts

Account reviews are performed quarterly by Christopher Stanziale, President. Account reviews are performed more frequently when market conditions dictate. Other conditions that may trigger a review are changes in the tax laws, new investment information, and changes in a client's own situation. Reviews take into consideration the client's current security positions and the likelihood that the performance of each security will contribute to the investment objectives of the client.

All clients receive quarterly portfolio reports and in some cases may include net worth statements and other financial reports as deemed necessary.

Client Referrals and Other Compensation

At the present time Advisory Wealth Management Services does not take on any new clients unless there are unusual circumstances that dictate the need for our services. However, if a referral came from current clients, estate planning attorneys, accountants, or other similar sources, the firm does not compensate referring parties for these referrals.

On a referral out, Advisory Wealth Management Services does not accept referral fees or any form of remuneration from other professionals if a prospect or client is referred to them. Therefore, there are no conflicts of interest created.

At this time, Advisory Wealth Management Services does share a client with another professional Investment Advisory Firm of which there is a Solicitation Agreement in place between Advisory Wealth Management Services and the Investment Advisory Firm. The client is aware of the sharing agreement by the signing of a disclosure document and is also aware that there is no increase of fees due to the sharing arrangement that is in place. Therefore, there are no conflicts of interest created.

Custody

All assets are held at qualified custodians, which means the custodians provide account statements directly to clients at their address of record at least quarterly. Clients are urged to compare the account statements received directly from their custodians to the performance report statements provided by Advisory Wealth Management Services.

Clients are frequently provided net worth statements and cash flow statements that are generated from our client relationship management system. These statements contain approximations of bank account balances provided by the client, as well as the value of land and hard to price real estate. The reports are used for long-term financial planning where the exact values of assets are not material to the financial planning tasks.

Investment Discretion

Advisory Wealth Management Services accepts discretionary authority to manage securities accounts on behalf of clients. Advisory Wealth Management Services has the authority to determine, without obtaining specific client consent, the securities to be bought or sold, and the amount of securities to be bought or sold. However, Advisory Wealth Management Services consults with the client prior to each trade to obtain concurrence if a blanket trading authorization has not been given.

The client approves the custodian to be used and the commission rates paid to the custodian. Advisory Wealth Management Services does not receive any portion of the transaction fees or commissions paid by the client to the custodian on certain trades.

Discretionary trading authority facilitates placing trades in a client's account on their behalf so that we may promptly implement the investment policy that a client has approved in writing.

Proxy Votes

Advisory Wealth Management Services does not vote proxies on securities. Clients are expected to vote their own proxies. Proxies and solicitations are received by clients from either the custodian or issuing company directly.

When assistance on voting proxies is requested, Advisory Wealth Management Services will provide recommendations to the Client. If a conflict of interest exists, it will be disclosed to the Client.

Financial Information

Advisory Wealth Management Services does not have any financial impairment that will preclude the firm from meeting contractual commitments to its clients.

A balance sheet is not required to be provided because Advisory Wealth Management does not serve as a custodian for client funds or securities, and does not require prepayment of fees of more than \$1200 per client and six months or more in advance.