

**Jon Lindberg**  
**Chitwood-Lindberg Wealth Management Company, Inc.**

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**This brochure supplement provides information about Mr. Lindberg that supplements the Chitwood-Lindberg Wealth Management Company, Inc. ("CLWMMCo") brochure. You should have received a copy of that brochure. Please contact Jon Lindberg at (205) 991-8484 if you did not receive the CLWMMCo brochure or if you have any questions about the contents of this supplement.**

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

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

Jon P. Lindberg, b. December 24, 1956

Education Background

University of Montevallo, AL – BA, Marketing (1981)

American College, Bryn Mawr PA – CLU® (1993)

Completion of Advanced Estate Planning Courses, Graduate School of Financial Services (1998)

The Chartered Life Underwriter® (CLU®) designation is issued by The American College to those who specialize in life insurance and estate planning. In order to qualify, individuals must complete 5 core courses and 3 elective courses; each course requires passing a 2-hour exam. Prerequisite experience includes 3 years of full time business experience within the 5 years preceding the award of the designation. Certified individuals abide by a Code of Ethics and complete 30 hours of continuing education every 2 years.

Business Background

<b>Firm</b>	<b>Position</b>	<b>Date</b>
Chitwood-Lindberg Wealth Mgmt, Inc.	Partner/Advisor	2009-Present
PROEQUITIES, Inc.	Registered Representative	1989-Present
J. Lindberg & Associates, LLC	Owner/Advisor	1981-Present
Crosscreek Television Prod Inc.	Owner	1983-2009

### **Item 3 - Disciplinary Information**

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events would be material to your evaluation of the representative. Mr. Lindberg has no information applicable to this Item.

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

Mr. Lindberg is a Registered Representative of PROEQUITIES, Inc., a registered broker-dealer and member of FINRA. He is compensated through commissions based on the sale of securities and other investment products and trails received from the sale of mutual funds.

Jon Lindberg owns 100% of J. Lindberg & Associates, LLC, a licensed Insurance Agency. Through this company, he offers Life, Individual and Group Disability Income, and Long Term Care insurance. J. Lindberg & Associates, LLC is also contracted with CSSI engineering to offer Commercial Cost Segregation services to clients who own commercial real estate. Cost Segregation Services run analyses and studies that accelerate the depreciation of commercial building renovation components into accelerated depreciation categories 5, 7, and 15 years rather than the conventional 27.5 and 39.5 year depreciation schedules. J. Lindberg & Associates, LLC may provide all of these aforementioned products and services to CLWMCo clients. CSSI may contract directly with CLWMCo clients to sell these services under the name of J. Lindberg & Associates, LLC. Advisory fees earned Jon Lindberg are paid out to J. Lindberg & Associates, LLC to compensate Jon Lindberg.

This may pose a conflict of interest to the extent that he has a financial incentive to recommend securities and other investments that may result in commissions, brokerage fees, 12b-1 fees or other payments. However, Mr. Lindberg is constrained by fiduciary principles to act in your best interest. In addition, you are under no obligation to purchase any recommended insurance products or commercial cost segregation services.

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

Mr. Lindberg does not receive compensation for advisory services other than fees paid by the client.

### **Item 6 - Supervision**

Mr. Lindberg is President and Chief Compliance Officer of CLWMCo and supervises all client accounts. He can be reached at (205) 991-8484. Mr. Lindberg adheres to CLWMCo's processes and procedures as described in our Code of Ethics. He will review your account quarterly or upon request to ensure that trading activity is in line with your stated objectives. Factors that are considered during such reviews include, but are not limited to the following: investment objectives, targeted allocation, current allocation, suitability, performance, monthly distributions, concentrated positions, diversification, and outside holdings.

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

Investment Advisor Representatives are required to disclose all material facts regarding certain arbitration awards, disciplinary proceedings and bankruptcy petitions. Mr. Lindberg has no information applicable to this Item.