

**Brochure Supplement Cover Page – September 2012**

**Arcadia Wealth Management, Inc.**  
**Form ADV Part 2B Brochure Supplement**  
**10 Edgewood Avenue**  
**Smithtown, NY 11787**

Walter Wisniewski, President  
Telephone: (631) 863-2700  
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This brochure provides information about the qualifications and business practices of Arcadia Wealth Management, Inc. If you have any questions about the contents of this brochure, please contact us at (631) 863-2700. 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 Arcadia Wealth Management, Inc. is also available on the SEC's website at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov).

Arcadia Wealth Management, Inc. is a registered investment adviser; registration does not imply a certain level of skill or training.

## **Brochure Supplement**

The following Form ADV Part 2B Brochure Supplement covers all employees of Arcadia Wealth Management, Inc. authorized to give investment advice to clients. Those employees authorized to give investment advice to clients include:

Walter F Wisniewski, Jr. – President  
Thomas J Snively – Senior Financial Planner  
Allison Vanaski – Chief Operations Officer

**Walter F Wisniewski, Jr., President**  
CERTIFIED FINANCIAL PLANNER™ practitioner  
Arcadia Wealth Management  
10 Edgewood Avenue  
Smithtown, NY 11787  
(631) 863-2700  
walter@arcadiawm.com

## **Background and Business Experience**

- **Born:** 7/12/1952
- **Education**  
M.A., Education, Columbia University, 1976  
B.A. in Music, Manhattan School of Music, 1974
- **Professional Experience**  
Arcadia Wealth Management, Inc., President (9/12 - present)  
Paragon Capital Management Corp., President - Financial Planning (5/93 - present)  
Walter F. Wisniewski, Sole Proprietor - Financial Planning (1/91 - 5/93)  
Benjamin Securities, Financial Planner (9/89 - 5/91)  
Prudential-Bache Securities, Financial Planner (3/83 - 4/89)
- **Professional Licenses and Designations**  
CERTIFIED FINANCIAL PLANNER™ practitioner: a certification owned by Certified Financial Planner Board of Standards Inc. (CFP Board). Individuals certified by CFP Board have taken the extra step to demonstrate their professionalism by voluntarily submitting to the rigorous CFP® certification process that includes demanding education, examination, experience and ethical requirements. These standards are called “the four Es.”

Individuals who meet the above criteria and are awarded the right to use the CFP® marks must meet the following ongoing education and ethics requirements in order to remain in good standing and continue to use the CFP® marks:

**Continuing Education** – Complete 30 hours of continuing education hours as approved by the CFP Board every two years, including two hours devoted to a review and understanding of the Code of Ethics and Professional Responsibility.

**Ethics** – Agree to be bound by the Standards of Professional Conduct which require that CFP® practitioners use a Fiduciary standard of care when providing financial planning services. The Code of Ethics also requires prompt disclosure to the CFP Board and notification of any legal or enforcement proceedings.

- **Professional Organization Memberships**  
Financial Planning Association  
Rotary International

## **Disciplinary Information**

Walter Wisniewski has not been the subject of any criminal or civil investment-related actions, or any violation of an investment-related statute or regulation. He has also not been the subject of any administrative proceedings before the SEC or any other federal, state, or foreign regulatory authority causing him to be denied authorization to act in any investment-related business or activity.

**Other Business Activity**

Walter Wisniewski is also President of Paragon Capital Management, Corp.

**Additional Compensation**

Walter Wisniewski receives compensation only for providing advisory services for clients of Arcadia Wealth Management, Inc. and for providing advisory services for clients of Paragon Capital Management, Corp. Walter also receives compensation from Paragon Agency, a separate Limited Liability Company for Arcadia's clients to purchase fixed annuities, life insurance policies, long-term care insurance policies, and property and casualty insurance policies.

**Supervision**

As president of Arcadia Wealth Management, Inc., Walter Wisniewski supervises all employees. Arcadia's client accounts are reviewed by periodically by Mr. Wisniewski and Mr. Snively in an attempt to ensure that each client portfolio has been invested in compliance within the investment guidelines approved by the client. Mr. Snively can be reached at (631) 863-2700.

**Thomas J Snively, Senior Financial Planner**  
CERTIFIED FINANCIAL PLANNER™ practitioner  
Arcadia Wealth Management  
10 Edgewood Avenue  
Smithtown, NY 11787  
(631) 863-2700  
tom@arcadiawm.com

## **Background and Business Experience**

- **Born:** 12/27/1970
- **Education**  
B.S., Mathematics, The Pennsylvania State University, 1992
- **Professional Experience**  
Arcadia Wealth Management, Inc., Senior Financial Planner (9/12 - present)  
Paragon Capital Management Corp., Financial Planner / Senior Financial Planner (8/01 - present)
- **Professional Licenses and Designations**  
CERTIFIED FINANCIAL PLANNER™ practitioner: a certification owned by Certified Financial Planner Board of Standards Inc. (CFP Board). Individuals certified by CFP Board have taken the extra step to demonstrate their professionalism by voluntarily submitting to the rigorous CFP® certification process that includes demanding education, examination, experience and ethical requirements. These standards are called “the four Es.”

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**Ethics** – Agree to be bound by the Standards of Professional Conduct which require that CFP® practitioners use a Fiduciary standard of care when providing financial planning services. The Code of Ethics also requires prompt disclosure to the CFP Board and notification of any legal or enforcement proceedings.

- **Professional Organization Memberships**  
Financial Planning Association

## **Disciplinary Information**

Thomas Snively has not been the subject of any criminal or civil investment-related actions, or any violation of an investment-related statute or regulation. He has also not been the subject of any administrative proceedings before the SEC or any other federal, state, or foreign regulatory authority causing him to be denied authorization to act in any investment-related business or activity.

## **Other Business Activity**

Thomas Snively is also a Senior Financial Planner of Paragon Capital Management, Corp.

**Additional Compensation**

Thomas Snively receives compensation only for providing advisory services for clients of Arcadia Wealth Management, Inc. and for providing advisory services for clients of Paragon Capital Management, Corp.

**Supervision**

Arcadia's president, Walter Wisniewski, supervises Thomas Snively. Mr. Wisniewski supervises the advice that Mr. Snively provides to clients on an ongoing basis by reviewing his preparation for, performance during, and follow-up after client meetings and other communications. Mr. Wisniewski can be reached at (631) 863-2700.

**Allison Vanaski, Chief Operations Officer**  
Arcadia Wealth Management  
10 Edgewood Avenue  
Smithtown, NY 11787  
(631) 863-2700

### **Background and Business Experience**

- **Born:** 7/4/1983
- **Education**  
B.A., Finance, Villanova University, 2005
- **Professional Experience**  
Arcadia Wealth Management, Inc., Chief Operations Officer (9/12 - present)  
Paragon Capital Management Corp., Chief Operations Officer (2/12 - present)  
Knight Capital Americas, Assistant Vice President (7/08-2/12)  
Lehman Brothers, Financial Analyst (8/05-7/08)

### **Disciplinary Information**

Allison Vanaski has not been the subject of any criminal or civil investment-related actions, or any violation of an investment-related statute or regulation. He has also not been the subject of any administrative proceedings before the SEC or any other federal, state, or foreign regulatory authority causing him to be denied authorization to act in any investment-related business or activity.

### **Other Business Activity**

Allison Vanaski is also the Chief Operations Officer of Paragon Capital Management, Corp.

### **Additional Compensation**

Allison Vanaski receives compensation only for providing advisory services for clients of Arcadia Wealth Management, Inc. and for providing advisory services for clients of Paragon Capital Management, Corp.

### **Supervision**

Arcadia's president, Walter Wisniewski, supervises Allison Vanaski. Mr. Wisniewski supervises the advice that Ms. Vanaski provides to clients on an ongoing basis by reviewing her preparation for, performance during, and follow-up after client meetings and other communications. Mr. Wisniewski can be reached at (631) 863-2700.