

**ITEM 1 – COVER PAGE**

**Terrence S. Wilson, CFA**

**Oak Family Advisors, LLC  
181 West Madison Street  
Suite 3360  
Chicago, IL 60602  
312-373-7221**

**This Brochure Supplement provides information about Terrence S. Wilson that supplements the Oak Family Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Oak Family Advisors, LLC at 312-373-7221 if you did not receive Oak Family Advisors, LLC.'s Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Terrence S. Wilson, CFA is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Terrence S. Wilson, CFA** (Chief Investment Officer) was born in 1963. He has a BS in Engineering from the University of Illinois and an MBA in Finance from the University of Chicago. Mr. Wilson joined Oak Family Advisors, LLC in December, 2011. Prior to joining Oak Family Advisors, LLC., he was with Mid-Continent Capital following its merger with an affiliated firm, Bufka & Rodgers in 2006 and with Bufka & Rodgers from 2004 – 2006.

The Chartered Financial Analyst (CFA) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis,

alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charterholders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

**ITEM 3 – DISCIPLINARY INFORMATION:**

No information is applicable to this item.

**ITEM 4 – OTHER BUSINESS ACTIVITIES:**

No information is applicable to this item.

**ITEM 5 – ADDITIONAL COMPENSATION:**

No information is applicable to this item.

**ITEM 6 – SUPERVISION:**

Terrence S. Wilson, Chief Investment Officer and principal of the firm, is supervised by John H. Fitzpatrick, Chairman and Chief Compliance Officer of Oak Family Advisors, LLC. Mr. Fitzpatrick may be reached at 312-373-7221.

John H. Fitzpatrick, Chairman and Chief Compliance Officer, monitors the investment advisory activities of Terrence S. Wilson, including the review of client securities transactions. Periodic investment committee and risk management committee meetings are held to discuss the economic environment and investments. Investment decisions are made at these meetings or in one-on-one ad hoc meetings with John H. Fitzpatrick. During investment and risk management committee meetings, economic and market results are reviewed and portfolio strategies are also assessed.

**ITEM 7 - REQUIREMENTS FOR STATE-REGISTERED ADVISERS:**

Registered investment advisers are required to disclose all material facts regarding:

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

There is no information for Terrence S. Wilson that is applicable to this item.

**ITEM 1 – COVER PAGE:**

**John H. Fitzpatrick  
Oak Family Advisors, LLC  
70 West Madison Street  
Suite 5720  
Chicago, IL 60602  
312-373-7221**

**This Brochure Supplement provides information about John H. Fitzpatrick that supplements the Oak Family Advisors, LLC. Brochure. You should have received a copy of that Brochure. Please contact Oak Family Advisors, LLC at 312-373-7221 if you did not receive Oak Family Advisors, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about John H. Fitzpatrick, CFA is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**John H. Fitzpatrick, CFA** (Chairman and Chief Compliance Officer) was born in 1956. Mr. Fitzpatrick received a Bachelor in Business Administration in Accounting from Loyola University of Chicago in 1979. Mr. Fitzpatrick is a non-practicing CPA (1979) and a Charter Financial Analyst (CFA) (1987). Mr. Fitzpatrick became Chairman of Oak Family Advisors, LLC in August of 2010. In addition, Mr. Fitzpatrick was appointed the position of Secretary General of the Geneva Association in June 2012, and in 2011 was elected as a Director of American International Group, Inc. (AIG). His most recent previous experience was from July 2006 to June 2010 with Pension Corporation of London. Mr. Fitzpatrick was a Partner & Director of Pension Corporation. He was also a Director of Pension Insurance Corporation Holdings, LLP and a Director of Pension Insurance Corporation Ltd.

Prior to Pension Corporation, Mr. Fitzpatrick was a CFO of two publicly-traded insurance and financial services companies (Suisse Re Group, Zurich, Switzerland (1998-2003) and Kemper Corporation, Long Grove, IL (1990-1996) and has held other senior executive and corporate finance positions in the insurance and financial services industry since 1978.

Certified Public Accountants (CPA) in Illinois, must have successfully completed at least 150 semester hours of acceptable credit approved by the Illinois Board of Examiners, including at least a U.S. bachelor's degree, and must complete all four sections of the CPA examination covering topics including audit, financial accounting and reporting, regulation and business environment.

The Chartered Financial Analyst (CFA) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charterholders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

### **ITEM 3 – DISCIPLINARY INFORMATION**

No information is applicable to this item.

### **ITEM 4 – OTHER BUSINESS ACTIVITIES**

Oak Street Management Co.,LLC and related entities manage money for wealthy families under Oak Family Advisors, LLC, provides insurance advice under Oak Street Insurance Advisors, LLC and manages a real estate related fund (Oak Street

Partners RE Fund I) and separate accounts invested in net lease portfolios of investment grade real estate.

As stated in Item 2 above, Mr. Fitzpatrick has the following outside business activities:

The Geneva Association – June 2012, Mr. Fitzpatrick was appointed the position of Secretary General.

American International Group, Inc. (AIG) - On May 11, 2011, elected as a Director of AIG.

His previous activities were the following:

Validus Holdings Ltd – Director – February, 2010 – March, 2011

Association of British Insurers – Director- 2003-2006

Atradius NV, (a trade credit insurer) – Director 2005-2007

#### **ITEM 5 – ADDITIONAL COMPENSATION**

John Fitzpatrick is a licensed insurance agent in the state of Illinois. To the extent insurance products are purchased thorough John by advisory clients, John may be paid a commission by the insurance company who issues the policy.

#### **ITEM 6 – SUPERVISION**

John H. Fitzpatrick, as Chairman and principal of the firm, is self-supervised, and bound by our Code of Ethics. He may be reached at 312-373-7221.

Terrence S. Wilson, Chief Investment Officer, performs periodic and regular monitoring of Mr. Fitzpatrick's personal trading activities including any account over which Mr. Fitzpatrick has direct or indirect beneficial interest, including the review of client securities transactions. Periodic investment committee and risk management committee meetings are held to discuss the economic environment and investments. Investment decisions are made at these meetings or in one-on-one ad hoc meetings with Terrence S. Wilson. During investment and risk management committee meetings, economic and market results are reviewed and portfolio strategies are also assessed.

**ITEM 7 - REQUIREMENTS FOR STATE-REGISTERED ADVISERS:**

Registered investment advisers are required to disclose all material facts regarding:

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

There is no information for John H. Fitzpatrick that is applicable to this item.

**FORM ADV PART 2B – BROCHURE SUPPLEMENT**  
**ITEM 1 – COVER PAGE**

**July 10 , 2013**

**Kevin R. Fitzpatrick**  
**Oak Family Advisors, LLC**  
**181 West Madison Street**  
**Suite 3360**  
**Chicago, IL 60602**  
**312-373-7221**

**This Brochure Supplement provides information about Kevin R. Fitzpatrick that supplements the Oak Family Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Oak Family Advisors, LLC at 312-373-7221 if you did not receive Oak Family Advisors, LLC.'s Brochure or if you have any questions about the contents of this supplement.**

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

**ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Kevin R. Fitzpatrick** was born in 1989. He received a BA in economics from George Washington University, Washington, DC in 2011. Mr. Fitzpatrick joined Oak Family Advisors, LLC in December, 2011. Prior to that, he was attending George Washington University as a full time student.

**ITEM 3 – DISCIPLINARY INFORMATION:**

No information is applicable to this item.

**ITEM 4 – OTHER BUSINESS ACTIVITIES:**

No information is applicable to this item.

**ITEM 5 – ADDITIONAL COMPENSATION:**

No information is applicable to this item.



**ITEM 6 – SUPERVISION:**

Kevin R. Fitzpatrick is supervised by John H. Fitzpatrick, Chairman and Chief Compliance Officer, of Oak Family Advisors, LLC. Mr. Fitzpatrick may be reached at 312-373-7221.

John H. Fitzpatrick, Chairman and Chief Compliance Officer, monitors the investment advisory activities of Kevin Fitzpatrick, including the review of client securities transactions. Periodic investment committee and risk management committee meetings are held to discuss the economic environment and investments. Investment decisions are made at these meetings or in one-on-one ad hoc meetings with John H. Fitzpatrick. During investment and risk management committee meetings, economic and market results are reviewed and portfolio strategies are also assessed.

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  - fraud, false statement(s), or omissions;
  - theft, embezzlement, or other wrongful taking of property;
  - bribery, forgery, counterfeiting, or extortion; or
  - dishonest, unfair, or unethical practices.
- If the supervised person has been the subject of a bankruptcy petition.

There is no information for Kevin Fitzpatrick that is applicable to this item.