

Form ADV Part 2B – Brochure Supplement

**AM GLOBAL WEALTH MANAGEMENT, LLC**

319 Clematis Street  
Suite 300  
West Palm Beach, FL 33401  
Telephone: 561-249-6826

Date of Supplement: August 7, 2013

This Brochure Supplement provides information about the Investment Advisory Registered Representatives that supplements AM Global Wealth Management, LLC's Brochure. You should have received a copy of that Brochure. Please contact the Firm's Chief Compliance Officer at the number provided above if you have not received our Brochure or if you have any questions about the content of this Supplement.

Additional information about the Registered Representatives of AM Global is available on the SEC's Web site at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Andrew Mehalko, CFA

### Item 2 – Educational Background and Business Experience

Registered investment advisers are required to disclose in this Item the supervised person's name, year of birth, educational background, and business background. Following is the information responsive to this requirement:

Name of Supervised Person: Andrew P. Mehalko

Year of Birth: 1965

Formal Education: Mr. Mehalko earned a Bachelor of Science degree in Finance from the University of North Carolina Greensboro in 1987.

Designations: In 1997, Mr. Mehalko earned the following designation and is in good standing with the granting authority:

#### **Certified Financial Analyst; CFA Institute**

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute — the largest global association of investment professionals. There are currently more than 90,000 CFA charter holders working in 134 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

High Ethical Standards. The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charter holders to:

- Place their clients' interests ahead of their own;
- Maintain independence and objectivity;
- Act with integrity;
- Maintain and improve their professional competence; and
- Disclose conflicts of interest and legal matters.

Global Recognition. Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charter holders—often making the charter a prerequisite for employment. Additionally, regulatory bodies in 22 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

Comprehensive and Current Knowledge. The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning. The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

To learn more about the CFA charter, visit [www.cfainstitute.org](http://www.cfainstitute.org).

Business Experience: Mr. Mehalko is the Managing Member of AM Global Wealth Management. He has served as the Managing Member since the Firm's inception in October of 2011. From March of 1999 through April of 2011, Mr. Mehalko served as the Chief Investment Officer for GenSpring Family Offices, LLC.

### **Item 3 – Disciplinary Information**

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

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

Mr. Mehalko devotes all of his professional time to AM Global Wealth Management and serving its clients. Mr. Mehalko does not receive commissions, bonuses or other cash or non-cash compensation based on the sale of securities or other investment products in the managed advisory accounts. Mr. Mehalko is not actively engaged in any non-investment related business or occupation that represents a substantial source of his income or involves a substantial amount of his time.

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

Mr. Mehalko is the President and Managing Member of AM Global Wealth Management. As such, Mr. Mehalko may receive distributions and profits from AM Global Wealth Management beyond a regular salary. Mr. Mehalko does not receive any compensation or additional economic benefits from any third party for providing advisory services through AM Global Wealth Management.

### **Item 6 – Supervision**

Mr. Mehalko serves as the Managing Member of the Firm. There is no person at the Firm senior to Mr. Mehalko. Mr. Mehalko's telephone number is (561) 249-6826. Ultimately, Mr. Mehalko is responsible for supervision of the individuals providing investment advice to clients. Given the small number of clients and employees at the Firm, supervision is performed on an individual client basis.

## Stephen Barimo

### Item 2 – Educational Background and Business Experience

Registered investment advisers are required to disclose in this Item the supervised person's name, year of birth, educational background, and business background. Following is the information responsive to this requirement:

Name of Supervised Person: Stephen E. Barimo

Year of Birth: 1968

Formal Education: Mr. Barimo earned a Bachelor of Arts degree in Economics from Bucknell University in 1990 and a Master's of Business Administration from Duke University's Fuqua School of Business in 1995.

Designations: Mr. Barimo does not hold any professional designations.

Business Experience: Mr. Barimo is a Founding Partner of AM Global Wealth Management. He has served as the Founding Partner since January of 2013. From 2001 through 2012, Mr. Barimo served as the Chief Marketing Officer, Head of Business Development and Chief Innovation Officer for GenSpring Family Offices, LLC.

### Item 3 – Disciplinary Information

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

### Item 4 – Other Business Activities

Mr. Barimo devotes all of his professional time to AM Global Wealth Management and serving its clients. Mr. Barimo does not receive commissions, bonuses or other cash or non-cash compensation based on the sale of securities or other investment products in the managed advisory accounts. Mr. Barimo is not actively engaged in any non-investment related business or occupation that represents a substantial source of his income or involves a substantial amount of his time.

### Item 5 – Additional Compensation

Mr. Barimo is a Founding Partner of AM Global Wealth Management. As such, Mr. Barimo may receive distributions and profits from AM Global Wealth Management beyond a regular salary. Mr. Barimo does not receive any compensation or additional economic benefits from any third party for providing advisory services through AM Global Wealth Management.

### Item 6 – Supervision

Mr. Barimo is supervised by Mr. Andrew Mehalko, President and Managing Member of AM Global Wealth Management. Mr. Mehalko's telephone number is (561) 249-6826. Ultimately, Mr. Mehalko is responsible for supervision of the individuals providing investment advice to clients.

4) bribery, forgery, counterfeiting, or extortion; or 5) dishonest, unfair, or unethical practices. Mr. Barimo has **NOT** been the subject of a bankruptcy petition at any time.

## Colin Hickey

### Item 2 – Educational Background and Business Experience

Registered investment advisers are required to disclose in this Item the supervised person's name, year of birth, educational background, and business background. Following is the information responsive to this requirement:

Name of Supervised Person: Colin J. Hickey

Year of Birth: 1989

Formal Education: Mr. Hickey earned a Master of Science degree in Finance from the Florida State University 2012. Mr. Hickey also earned a Bachelor of Science degree in Finance with a minor in Economics from the Florida State University in 2011.

Designations: Mr. Hickey does not hold any professional designations.

Business Experience: Mr. Hickey is an Investment Analyst at AM Global Wealth Management, where he has served since 2012.

### Item 3 – Disciplinary Information

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

### Item 4 – Other Business Activities

Mr. Hickey devotes all of his professional time to AM Global Wealth Management and serving its clients. Mr. Hickey does not receive commissions, bonuses or other cash or non-cash compensation based on the sale of securities or other investment products in the managed advisory accounts. Mr. Hickey is not actively engaged in any non-investment related business or occupation that represents a substantial source of his income or involves a substantial amount of his time.

### Item 5 – Additional Compensation

Mr. Hickey does not receive any additional compensation or other economic benefits from sources other than AM Global.

### Item 6 – Supervision

Mr. Hickey is supervised by Mr. Andrew Mehalko, President and Managing Member of AM Global Wealth Management. Mr. Mehalko's telephone number is (561) 249-6826. Ultimately, Mr. Mehalko is responsible for supervision of the individuals providing investment advice to clients.

## Maria Pia Leon

### Item 2 – Educational Background and Business Experience

Registered investment advisers are required to disclose in this Item the supervised person's name, year of birth, educational background, and business background. Following is the information responsive to this requirement:

Name of Supervised Person: Maria Pia Leon

Year of Birth: 1966

Formal Education: Ms. Leon earned a Master of Arts in International Relations from the University of Miami in 1995. Ms. Leon also earned a Bachelor of Arts degree in Economics from the Universidad del Pacifico in Lima, Peru in 1989.

Designations: Ms. Leon does not hold any professional designations.

Business Experience: Ms. Leon is an Advisor at AM Global Wealth Management. Prior to joining AM Global in 2013, Ms. Leon was a Partner at WE Family Offices (formerly known as GenSpring Family Offices International.)

### Item 3 – Disciplinary Information

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

### Item 4 – Other Business Activities

Ms. Leon devotes all of her professional time to AM Global Wealth Management and serving its clients. Ms. Leon does not receive commissions, bonuses or other cash or non-cash compensation based on the sale of securities or other investment products in the managed advisory accounts. Ms. Leon is not actively engaged in any non-investment related business or occupation that represents a substantial source of her income or involves a substantial amount of her time.

### Item 5 – Additional Compensation

Ms. Leon does not receive any additional compensation or other economic benefits from sources other than AM Global.

### Item 6 – Supervision

Ms. Leon is supervised by Mr. Andrew Mehalko, President and Managing Member of AM Global Wealth Management. Mr. Mehalko's telephone number is (561) 249-6826. Ultimately, Mr. Mehalko is responsible for supervision of the individuals providing investment advice to clients.