

## **Wrap Fee Program Brochure**

### **Form ADV 2A - Appendix 1**

#### **Item 1 - Cover Page**

**Doyle Wealth Management, Inc.**  
**CRD# 134503**

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This brochure provides information about the qualifications and business practices of Doyle Wealth Management, Inc. If you have any questions about the contents of this brochure, please contact us at (727) 898-3063 or **[info@doylewealth.com](mailto:info@doylewealth.com)**. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state authority.

Doyle Wealth Management, Inc. is an investment advisory firm registered with the appropriate regulatory authority. Registration does not imply a certain level of skill or training. Additional information about Doyle Wealth Management, Inc. also is available on the SEC's website at **[www.AdviserInfo.sec.gov](http://www.AdviserInfo.sec.gov)**.

#### **Item 2 - Material Changes**

This is the initial Wrap Brochure of Doyle Wealth Management, Inc., and is prepared according to the SEC's requirements and rules. In the future, this Item will discuss only specific material changes that are made to the Wrap Brochure and will provide clients with a summary of such changes. We will also reference the date of our last annual update of our brochure. We will further provide you with a new Wrap Brochure as necessary based on changes, new information, or at your request, at any time, without charge.

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#### ***Item 4 - Services, Fees and Compensation***

##### General Information

Doyle Wealth Management, Inc. ("DWM") was formed in 2005, and provides financial and estate planning services, portfolio management, and general consulting services to its clients. Such services may be offered through the "Doyle Wealth Wrap Program" or the "Program", which has been designed to simplify the payment of management fees and brokerage expenses.

Robert K. Doyle and Jillian D. Doyle are the principal owners of DWM. Please see DWM's **Brochure Supplements**, Exhibit A, for more information on Bob Doyle and other individuals who formulate investment advice and have direct contact with clients, or have discretionary authority over client accounts.

##### Portfolio Management Services

At the beginning of a client relationship, DWM meets with the client, gathers information, and performs research and analysis as necessary to develop the client's Investment Plan. The Investment Plan will be updated from time to time when requested by the client, or when determined to be necessary or advisable by DWM based on updates to the client's financial or other circumstances.

To implement the client's Investment Plan, DWM will manage the client's investment portfolio on a discretionary basis. As a discretionary investment adviser, DWM will have the authority to supervise and direct the portfolio without prior consultation with the client.

##### General Fee Information

Fees paid by clients to participate in the Doyle Wealth Wrap Program generally include brokerage expenses (e.g., commissions, ticket charges, etc.) as well as the management fee paid to DWM. Under the all-inclusive billing alternative, DWM will assess one client fee that captures the management, brokerage and administrative portions collectively. Fees are individually negotiated with each client.

Fees paid to DWM are exclusive of and distinct from the fees and expenses charged by mutual funds, ETFs (exchange traded funds) or other investment pools to their shareholders (generally including a management fee and fund expenses, as described in each fund's prospectus or offering materials). Clients will pay certain fees in addition to the fees of the Doyle Wealth Wrap Program, such as margin interest, check fees, trade-away fees, odd lot differentials and other similar types of fees. Clients will pay certain fees in addition to the fees of the Doyle Wealth Wrap Program, as more fully described in the Brochure, Part 2A. Doyle Wealth Wrap Program fees which DWM does not pay to third parties in connection with transaction and execution expenses are retained by DWM. Because of this, DWM may have a disincentive to trade securities in the accounts of clients in the Program.

The client should review all fees charged by funds, DWM and others to fully understand the total amount of fees paid by the client for investment and financial-related services. Clients participating in the Doyle Wealth Wrap Program may pay higher or lower fees than clients purchasing such services separately, depending on the cost of services if provided separately and the level of trading in a particular client's account.

#### Wrap Program Fee Information

Fees under the Doyle Wealth Wrap Program are negotiated on an individual client basis.

#### ***Item 5 - Account Requirements and Types of Clients***

DWM serves individuals, endowments, foundations, corporations, trusts, estates, pension and profit sharing plans and charitable organizations. With some exceptions, the minimum portfolio value eligible for conventional investment advisory services is \$500,000, and the annual minimum fee charged is \$2,000. Under certain circumstances and in its sole discretion, DWM may negotiate such minimums.

#### ***Item 6 - Portfolio Manager Selection and Evaluation***

The Doyle Wealth Wrap Program was designed to simplify for clients the payment of management fees and brokerage expenses. The Program does not select advisers in addition to DWM, which is the only Portfolio Manager for the Program.

#### ***Item 7 - Client Information Provided to Portfolio Managers***

DWM is the only portfolio manager under the Doyle Wealth Wrap Program. No information is shared with any other portfolio manager.

#### ***Item 8 - Client Contact with Portfolio Managers***

DWM is the only portfolio manager under the Doyle Wealth Wrap Program. No restrictions are placed on client's ability to contact or consult with DWM.

#### ***Item 9 - Additional Information***

Neither DWM nor its Management Persons have any disciplinary disclosure required. Please see ADV Part 2A for more information in the following areas: ***Item 10 - Other Financial Industry Activities and Affiliations, Item 11 - Code of Ethics, Item 13 - Review of Accounts, Item 14 - Client Referrals and Other Compensation, and Item 18 - Financial Information.***