

**Item 1: Cover Page**  
**Part 2B of Form ADV: Brochure Supplement**  
**March 2014**

**Joel Aronson**



**HIGHTSIGHT**

**57 River Street, Suite 301**  
**Wellesley, MA 02481**  
**[www.highsightllc.com](http://www.highsightllc.com)**

**Firm Contact:**  
**Joel Aronson**  
**Chief Compliance Officer**

**This brochure supplement provides information about Joel Aronson that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Aronson if you did not receive HighSight, LLC's brochure or if you have any questions about the contents of this supplement.**

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

## Item 2: Educational Background & Business Experience

**Joel Aronson**

**Year of Birth:** 1947

### **Educational Background:**

- 1970: Northeastern University; BS in Business Administration; Accounting Concentration
- 1971: Babson College; Masters in Business

### **Business Background:**

- 09/2000 – Present HighSight, LLC; Managing Member & Investment Advisor
- 09/1975 – Present Alexander, Aronson, Finning & Co, PC; Vice President
- 03/2007 – 07/2012 CSSC Brokerage Services, Inc; Registered Representative
- 09/2000 – 07/2012 CSSC Investment Advisory Services, Inc; Investment Advisor

### **Exams, Licenses & Professional Designations**

- 1972: Certified Public Accountant (CPA)
- 2000: Series 7 Exam
- 2001: Series 66 Exam
- 2002: Series 24 Exam
- 2007: Personal Financial Specialist (PFS)

### **Certified Public Accountant (CPA):**

Joel Aronson has a professional designation, Certified Public Accountant. CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members<sup>1</sup> are required to follow a rigorous *Code of Professional Conduct* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's *Code of Professional Conduct* within their state accountancy laws or have created their own.

### **Personal Financial Specialist (PFS):**

Joel Aronson has a professional designation, Personal Financial Specialist. The PFS credential demonstrates that an individual has met the minimum education, experience and testing required of a CPA in addition to a minimum level of expertise in personal financial planning. To attain the PFS credential, a candidate must hold an unrevoked CPA license, fulfill 3,000 hours of personal

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<sup>1</sup> This description represents the requirements as of 1/1/2011. It is the responsibility of the adviser to disclose the qualifications in place when he or she attained the credential.

financial planning business experience, complete 80 hours of personal financial planning CPE credits, pass a comprehensive financial planning exam and be an active member of the AICPA. A PFS credential holder is required to adhere to AICPA's *Code of Professional Conduct*, and is encouraged to follow AICPA's *Statement on Responsibilities in Financial Planning Practice*. To maintain their PFS credential, the recipient must complete 60 hours of financial planning CPE credits every three years. The PFS credential is administered through the AICPA.

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events material to the evaluation of Mr. Aronson.

### **Item 4: Other Business Activities**

Mr. Aronson is part owner, Vice President and a Certified Public Accountant ("CPA") of Alexander, Aronson, Finning & Co, PC. As a CPA he is actively engaged in the business of accounting which he provides to his clients. As a result of his CPA practice, Mr. Aronson offers advice and services which are non-investment related to his clients. Clients are not obligated to engage in these services. This other business activity accounts for 25% of his time.

Mr. Aronson is a part owner and treasurer of AAF Leasing Corp, an organization that provides motor vehicles for lease. Mr. Aronson is a partner of AAF Realty Trust and partner of Five Partners Realty Trust, organizations that provide real estate properties to lease. Clients are not actively solicited to invest or participate in any of these outside businesses. These activities combined account for approximately 3% of Mr. Aronson's time.

### **Item 5: Additional Compensation**

We have nothing to disclose in this regard.

### **Item 6: Supervision**

Mr. Aronson is the sole principal and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.

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**Brian Joyce**



**HIGHTSIGHT**

**57 River Street, Suite 301  
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[www.highsightllc.com](http://www.highsightllc.com)**

**Firm Contact:  
Joel Aronson  
Chief Compliance Officer**

**This brochure supplement provides information about Brian Joyce that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Aronson if you did not receive HighSight, LLC's brochure or if you have any questions about the contents of this supplement.**

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

## Item 2: Educational Background & Business Experience

**Brian Andrew Joyce**

**Year of Birth:** 1979

### **Educational Background:**

- 2001: University of Massachusetts-Amherst; BA in Accounting & Information Systems

### **Business Background:**

- 03/2010 – Present Brian Joyce, LLC; President
- 06/2005 – Present HighSight, LLC; Investment Advisor Representative
- 08/2005 – 07/2012 CSSC Investment Advisory Services; Advisory Representative
- 07/2001 – 03/2010 Alexander, Aronson, Finning & Co, PC; Manager

### **Exams, Licenses & Professional Designations**

- 2003: Certified Public Accountant (CPA)
- 2005: Series 7 & Series 66 Exams
- 2009: CERTIFIED FINANCIAL PLANNER™ (CFP®)
- 2011: Series 24 Exam

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members<sup>1</sup> are required to follow a rigorous *Code of Professional Conduct* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's *Code of Professional Conduct* within their state accountancy laws or have created their own.

### **CFP® - Certified Financial Planner™:**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with

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clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events material to the evaluation of Mr. Joyce.

#### **Item 4: Other Business Activities**

Mr. Joyce serves as a Board Member and President of Teaching Tree, a non-profit organization. Mr. Joyce spends less than 1% of his time with this activity during business hours. He is not compensated for his service as a board member.

#### **Item 5: Additional Compensation**

We have nothing to disclose in this regard.

#### **Item 6: Supervision**

Joel Aronson, Chief Compliance Officer of HighSight, LLC, supervises and monitors Mr. Joyce's activities on a regular basis. Mr. Aronson reviews all outgoing correspondence for written financial advice that Mr. Joyce provides to her clients. Please contact Mr. Aronson if you have any questions about Mr. Joyce's brochure supplement at 781-965-9100.

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**Philip Christiano**



**HIGHTSIGHT**

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Wellesley, MA 02481  
[www.highsightllc.com](http://www.highsightllc.com)**

**Firm Contact:  
Joel Aronson  
Chief Compliance Officer**

**This brochure supplement provides information about Philip Christiano that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Aronson if you did not receive HighSight, LLC's brochure or if you have any questions about the contents of this supplement.**

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



## Item 2: Educational Background & Business Experience

**Philip Joseph Christiano**

**Year of Birth:** 1961

### **Educational Background:**

- 1983: Boston College, Carroll School of Management; Bachelor of Science Accounting
- 2002: Bentley University; Master of Science Financial Planning

### **Business Background:**

- 09/2012 – Present HighSight, LLC; Investment Advisor
- 01/2009 – 08/2012 1<sup>st</sup> Global Advisors, Inc
- 01/2009 – 08/2012 1<sup>st</sup> Global Capital Corp; Senior Wealth Manager
- 10/2008 – 08/2012 MainSail Advisors Services, LLC; Senior Wealth Manager
- 05/2008 – 10/2008 Colonial Wealth Management; Senior Wealth Manager
- 05/2008 – 10/2008 LPL Financial
- 02/2008 – 05/2008 Gosule Butkus & Jesson LLP; Professional Tax Preparer
- 12/2007 – 01/2008 Self Employed; Tax Preparer
- 12/2005 – 12/2007 Wachovia Wealth Management; Relationship Manager
- 05/2002 – 12/2005 US Financial Advisors, LLC

### **Exams, Licenses & Professional Designations**

- 2002: Series 7 Exam
- 2009: Series 66 Exam
- 2009: Certified Public Accountant (CPA)

### **Certified Public Accountant (CPA):**

Philip Christiano has a professional designation, Certified Public Accountant. CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members<sup>1</sup> are required to follow a rigorous *Code of Professional Conduct* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's *Code of Professional Conduct* within their state accountancy laws or have created their own.

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### **Item 3: Disciplinary Information**

There are no legal or disciplinary events material to the evaluation of Mr. Christiano.

### **Item 4: Other Business Activities**

Mr. Christiano is a Certified Public Accountant. In such capacity, he may also provide income tax preparation or accounting services. These services are independent of our financial planning and investment advisory services and are governed under a separate engagement agreement. The fees for these services are billed hourly and are in addition to the client's HighSight, LLC fees. The hourly rate varies depending on the complexity of the work conducted. The client has the option of engaging our firm for tax preparation or accounting services.

### **Item 5: Additional Compensation**

We have nothing to disclose in this regard.

### **Item 6: Supervision**

Joel Aronson, Chief Compliance Officer of HighSight, LLC, supervises and monitors Mr. Christiano's activities on a regular basis. Mr. Aronson reviews all outgoing correspondence for written financial advice that Mr. Christiano provides to her clients. Please contact Mr. Aronson if you have any questions about Mr. Christiano's brochure supplement at 781-965-9100.

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**Kelli Grew**



**HIGHTSIGHT**

**57 River Street, Suite 301  
Wellesley, MA 02481  
[www.highsightllc.com](http://www.highsightllc.com)**

**Firm Contact:  
Joel Aronson  
Chief Compliance Officer**

**This brochure supplement provides information about Ms. Grew that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Aronson if you did not receive HighSight, LLC's brochure or if you have any questions about the contents of this supplement.**

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

## **Item 2: Educational Background & Business Experience**

**Kelli Marie Grew**

**Year of Birth:** 1988

### **Educational Background:**

- 2010: University of New Hampshire; Bachelor's in Business Administration

### **Business Background:**

- 08/2012 – Present HighSight, LLC; Financial Planning Associate & Investment Advisor
- 02/2011 – 08/2012 Alexander, Aronson, Finning & Co, PC; Scheduling Coordinator
- 08/2010 – 02/2011 Cape Cod Five Savings Bank; Mortgage Underwriter's Assistant
- 06/2009 – 08/2009 Hill Holliday; Intern

### **Exams, Licenses & Other Professional Designations:**

- 2013: Series 65 Exam

## **Item 3: Disciplinary Information**

There are no legal or disciplinary events material to the evaluation of Ms. Grew.

## **Item 4: Other Business Activities**

We have nothing to disclose in this regard.

## **Item 5: Additional Compensation**

We have nothing to disclose in this regard.

## **Item 6: Supervision**

Joel Aronson, Chief Compliance Officer of HighSight, LLC, supervises and monitors Ms. Grew's activities on a regular basis. Mr. Aronson reviews all outgoing correspondence for written financial advice that Ms. Grew provides to her clients. Please contact Mr. Aronson if you have any questions about Ms. Grew's brochure supplement at 781-965-9100.