



Brochure Supplement Cover Page – January 2014

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

Walter Wisniewski, President
Telephone: (631) 549-5400
Fax: (631) 863-2706

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) 549-5400. 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.

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

REGISTERED INVESTMENT ADVISOR

Arcadia Wealth Management 10 Edgewood Avenue Smithtown, NY 11787

PHONE (631) 549-5400 FAX (631) 863-2706

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

Allison Vanaski – Senior Financial Planner, VP of Investments

Lee Slater – CFPTM, Enrolled Agent, MBA

Walter F Wisniewski, Jr., President
CERTIFIED FINANCIAL PLANNER™ practitioner
Arcadia Wealth Management
10 Edgewood Avenue
Smithtown, NY 11787
(631) 549-5400
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 Ms. Vanaski in an attempt to ensure that each client portfolio has been invested in compliance within the investment guidelines approved by the client. Ms. Vanaski can be reached at (631) 549-5400.

Allison Vanaski, Senior Financial Planner, VP of Investments

Arcadia Wealth Management
10 Edgewood Avenue
Smithtown, NY 11787
(631) 549-5400

Background and Business Experience

- **Born:** 7/4/1983
- **Education**
B.A., Finance, Villanova University, 2005
- **Professional Experience**
Arcadia Wealth Management, Inc., Senior Financial Planner, VP of Investments (01/14 – present)
Paragon Capital Management Corp., Senior Financial Planner, VP of Investments (01/14 – present)
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 Senior Financial Planner, VP of Investments, 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) 549-5400.

Lee Slater, CFP™, Enrolled Agent, MBA

Arcadia Wealth Management
10 Edgewood Avenue
Smithtown, NY 11787
(631) 549-5400
lslater@arcadiawm.com

Background and Business Experience

- **Born:** 9/5/1943
- **Education**
M.B.A., New York University, 1972
B.S. Engineering, Carnegie Mellon University, 1967
- **Professional Experience**
Arcadia Wealth Management, Inc., President (9/12 - present)
Paragon Capital Management Corp., President - Financial Planning (11/10 - present)
Popular Tax, President, (1998 – present)
- **Professional Licenses and Designations**
Enrolled Agent EA, Certified Divorce Financial Analyst CDFA, MBA

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:

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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**
National Association of Enrolled Agents
National Association of Tax Professionals
NY State Mediation Association

Disciplinary Information

Lee Slater 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

Lee Slater is also President of Popular Tax, Inc. and is a CFP™, Enrolled Agent, MBA of Paragon Capital Management, Corp.

Additional Compensation

Lee Slater receives compensation for providing advisory services for clients of Paragon Capital Management Corp. and for providing advisory services for clients of Arcadia Wealth Management, Inc.

Lee also receives compensation from Popular Tax, Inc. a separate company that provides tax preparation services that is not affiliated with PCM or Arcadia's clients.

Supervision

As president of Paragon Capital Management Corp, Walter Wisniewski supervises all employees. Arcadia's client accounts are reviewed by periodically by Mr. Wisniewski and Ms. Vanaski in an attempt to ensure that each client portfolio has been invested in compliance within the investment guidelines approved by the client. Mr. Wisniewski can be reached at (631) 549-5400.