

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

**Jeffrey W. Yeakle**

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**Firm Contact:  
Jeffrey Yeakle  
Chief Compliance Officer**

This brochure supplement provides information about Jeffrey W. Yeakle that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Yeakle if you did not receive MY Wealth Management, Inc's brochure or if you have any questions about the contents of this supplement.

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

## Item 2: Educational Background & Business Experience

**Jeffrey Wayne Yeakle**

**Year of Birth:** 1965

### **Educational Background:**

- 1993: University of Maryland; Bachelor of Science in Business Management

### **Business Background:**

- 09/2013 – Present MY Wealth Management, Inc; President, Chief Compliance Officer & Investment Advisor
- 08/2012 – 11/2013 McGlaughlin Yeakle; President
- 08/2004 – 07/2012 McGlaughlin Yeakle; Vice-President
- 01/2003 – 07/2004 McGlaughlin Financial Advisory; Financial Planner

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

- 2007: Series 24 Exam
- 2003: Series 65 Exam
- 2003: Certified Financial Planner (CFP®)

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered 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 high standard of professional education, stringent code of conduct and standards of practice and ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: 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, pass the comprehensive CFP® Certification Examination, Complete at least three years of full-time financial planning-related experience and agree to be bound by CFP Board's *Standards of Professional Conduct*.

Individuals who become certified must 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 industry and 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.

- 2003: Chartered Financial Consultant (ChFC)

The ChFC® is offered by The American College. To receive the ChFC® designation, you must successfully complete all courses in your selected program, meet experience requirements and ethics standards, and agree to comply with The American College Code of Ethics and Procedures.

Three years of full-time business experience is required for all Huebner School designations. The following activities meet the required business experience qualifications included in the ChFC® certification process.

**Insurance & Health Care:**

- Field underwriting and management, including sales and service activities, supervision and management of persons involved in sales or services, or staff support of persons in these activities.
- Company management and operations in positions involving substantial responsibility.
- Financial services and employee benefits
- Client service and related management, including direct contact with clients, supervision and management of persons involved directly in the process of providing financial services or employee benefits, or staff support of persons in these activities.
- Financial institution management and operations in positions involving substantial responsibility.

**Other:**

- University or college teaching of subjects related to the Huebner School curriculum on a full-time basis at an accredited institution of higher education.
- Government regulatory service in a responsible administrative, supervisory, or operational capacity.
- Activities directly or indirectly related to the protection, accumulation, conservation, or distribution of the economic value of human life; these include the work of actuaries, attorneys, CPAs, investment advisers, real estate investment advisers, stockbrokers, trust officers, or persons in other similar occupations.

- 1996: Series 7 & Series 63 Exams

### **Item 3: Disciplinary Information<sup>1</sup>**

We have nothing to disclose in this regard.

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

Mr. Yeakle is a licensed insurance agent. He may offer insurance products and receive normal and customary fees as a result of insurance sales. A conflict of interest may arise as these insurance

<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Jeffrey W. Yeakle to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Jeffrey W. Yeakle to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

sales may create an incentive to recommend products based on the compensation he and/or our supervised persons may earn and may not necessarily be in the best interests of the client.

Mr. Yeakle is a registered representative of Purshe Kaplan Sterling Investments, Inc. ("PKS"), member FINRA/SIPC. He may offer securities and receive normal and customary commissions as a result of securities transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation Mr. Yeakle may earn and may not necessarily be in the best interests of the client.

Mr. Yeakle is the President of Tax Qualified Trusts, Inc, an insurance firm that also provides support, facilities, equipment and office space. Mr. Yeakle spends approximately 25% of his time with this business activity. Clients of MY Wealth Management, Inc are under no obligation to utilize these services.

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

We have nothing to disclose in this regard.

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

Jeffrey W. Yeakle is the sole registered 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.