

**Form ADV Part 2B – Brochure Supplement**  
**Item 1: Cover Page**  
**May 2014**

**James Taylor**

**Groundwork Wealth Management, LLC**  
**740 Springdale Drive, Suite 104**  
**Exton, PA 19341**

This brochure supplement provides information about James Taylor that supplements our brochure. You should have received a copy of that brochure. Please contact James Taylor, Chief Compliance Officer if you did not receive Groundwork Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

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

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

**James P. Taylor**  
**Year of Birth:** 1981

### **Educational Background:**

- 2004; Bob Jones University; B.A. Financial Management

### **Business Background:**

- 03/2014 – Present      Groundwork Wealth Management, LLC;  
Managing Member and Financial Advisor
- 02/2004 – 03/2014      Ameriprise Financial Services, Inc.; Financial Advisor
- 02/2004 – 03/2014      IDS Life Insurance Company; Insurance Agent
- 02/2004 – 03/2014      Riversource Life Insurance Company; Insurance Agent
- 01/2004 – 02/2004      M&M Furniture; Sales Representative

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

- 05/2004 – Series 7
- 04/2004 – Series 66
- 02/2004 – Accident and Health Insurance License

## **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to your evaluation of Mr. Taylor.

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

Mr. Taylor 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 sales may create an incentive to recommend products based on the compensation he may earn.

## **Item 5: Additional Compensation**

Mr. Taylor does not receive any additional compensation or economic benefit outside of his regular salary such as any sales awards or other prizes.

## **Item 6: Supervision**

Mr. Taylor 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.

## **Item 7: Requirements for State-Registered Advisers**

Mr. Taylor has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.