

KEEN WEALTH ADVISORS

Perceptive. Personalized. Precise.

**6201 College Blvd., Suite 325
Overland Park, KS 66211
www.KeenWealthAdvisors.com**

**Firm Contact:
Matthew Wilson
Chief Compliance Officer**

This brochure supplement provides information about Mr. Keen that supplements our Firm Brochure. You should have received a copy of that brochure. Please contact Mr. Wilson if you did not receive one or if you have any questions about the contents of this supplement.

Additional information about Mr. Keen is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

William Trell Keen | *Year of Birth:* 1968

Educational Background:

- 1991; University of Central Missouri; BSBA Finance

Business Background:

- 05/2014 – Present KWMG, LLC d/b/a Keen Wealth Advisors;
Managing Member & Investment Adviser Representative
- 05/2001 – 05/2014 Wells Fargo Advisors; Managing Director

Exams, Licenses & Other Professional Designations:

- 2006: Chartered Retirement Planning Counselor (CRPC®)
- 1998: Series 65 Exam
- 1993: Series 3 & 7 Exams
- 1992: Series 63 Exam

Chartered Retirement Planning Counselor (CRPC®)

Mr. Keen has a professional designation, Chartered Retirement Planning Counselor (CRPC®). The CRPC is offered by The College for Financial Planning®. The CRPC Program focuses on the pre- and post-retirement needs of individuals. Enrollment in the program guides you through the retirement process, addressing issues such as estate planning and asset management. The College for Financial Planning® awards the Chartered Retirement Planning CounselorSM and CRPC® designation to students who: successfully complete the program; pass the final examination; and comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct promulgated by The College for Financial Planning®.

Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are required to be disclosed. Successful students receive a certificate and are granted the right to use the designation on correspondence and business cards for a two-year period.

Continued use of the CRPC® designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the CRPC® designation by: completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self-disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct.

Item 3: Disciplinary Information¹

Mr. Keen has a regulatory event and customer disputes to disclose, the details of which we are able to provide upon your request. Additional information about Mr. Keen is also available on the SEC's website at www.adviserinfo.sec.gov by searching CRD# 2212517.

Item 4: Other Business Activities

Mr. Keen has no outside business activities to disclose.

Item 5: Additional Compensation

Mr. Keen 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. Wilson, Chief Compliance Officer of Keen Wealth Advisors, supervises and monitors Mr. Keen's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Wilson if you have any questions about Mr. Keen's brochure supplement at (913) 624-1841.

¹ 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 Mr. Keen to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Mr. Keen 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.

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Additional information about Mr. Wilson is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

Matthew David Wilson | *Year of Birth:* 1981

Educational Background:

- 2003; Rockhurst University; BS Finance & Accounting

Business Background:

- 05/2014 – Present KWMG, LLC d/b/a Keen Wealth Advisors
Investment Adviser Representative/Chief Compliance Officer
- 04/2002 – 05/2014 Wells Fargo Advisors, LLC; Financial Advisor

Exams, Licenses & Other Professional Designations:

- 2011: Certified Financial Planner (CFP®)
- 2005: Series 66 Exam
- 2004: Series 7 Exam

Certified Financial Planner™ (CFP®) certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam (administered in 10 hours over a 2 day period) and agreeing to be bound by the CFP board's standard of professional conduct. As a prerequisite the IAR must have a bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the standards of professional conduct.

Item 3: Disciplinary Information

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

Item 4: Other Business Activities

Mr. Wilson is a registered representative of Purshe Kaplan Sterling Investments, Inc., 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 he may earn.

Item 5: Additional Compensation

Mr. Wilson 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

William Keen, Managing Member of Keen Wealth Management, supervises and monitors Mr. Wilson's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Keen if you have any questions about Mr. Wilson's brochure supplement at (913) 624-1841.