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## Supervised Person Brochure

Part 2B of Form ADV

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**Charles Shaefer**



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This brochure supplement provides information about Charles Shaefer and supplements Keystone Wealth Advisors, Inc.'s brochure. You should have received a copy of that brochure. Please contact Charles Shaefer if you did not receive Keystone Wealth Advisors, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Charles Shaefer (CRD#727283) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

May 21, 2015

## **Brochure Supplement (Part 2B of Form ADV)**

### **Supervised Person Brochure**

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#### **Additional Investment Advisor Representative**

##### **Charles Shaefer**

- Year of birth: 1953
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#### **Educational Background and Business Experience**

##### **Educational Background:**

- University of Wisconsin; Graduated 1975

##### **Business Experience:**

- Keystone Wealth Advisors, Inc; Investment Advisor Representative; 08/2010-Present
  - Retirement Plan Advisors; Owner /Investment Advisor Representative; 1998-2013
  - Fintegra; Account Executive; 2001-2001
  - Linsco/Private Ledger Corp.; Registered Representative; 1996-1999
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#### **Disciplinary Information**

None to report

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#### **Other Business Activities**

None to report

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#### **Performance Based Fee Description**

None to report

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#### **Supervision**

Charles Shaefer is supervised by Steven Carlson, Chief Compliance Officer. He reviews Charles' work through client account reviews, quarterly personal transaction reports as well as face-to-face interactions.

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#### **Requirements for State-Registered Advisors**

Arbitration Claims: None

Self-Regulatory Organization or Administrative Proceeding: None

Bankruptcy Petition: None