

Form ADV Part 2B – Brochure Supplement
Item 1: Cover Page
March 2015

Emily Sheu
CRD# 4994827

Sheu Wealth Management, LLC
4 MacDonald Ave., Suite 5
Armonk, NY 10504

This brochure supplement provides information about Emily Jarlin Sheu that supplements our brochure. You should have received a copy of that brochure. Please contact Ms. Sheu if you did not receive Sheu Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

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

Item 2: Educational Background & Business Experience

Emily Jarlin Sheu
Year of Birth: 1985

Educational Background:

- 2007; Fordham University; B.S. in Public Accounting

Business Background:

- 01/2015 – Present Sheu Wealth Management, LLC; Owner
- 04/2012 – 01/2015 UBS Financial Services; Financial Advisor
- 03/2008 – 03/2012 Bank of America/Merrill Lynch; Financial Advisor

Exams, Licenses & Other Professional Designations:

- 2013: Certified Financial Planner (CFP®)
- 2009: Chartered Retirement Planning Counselor (CRPC®)
- 2008: Series 7 & 66 Exams
- 2008: Life, Accident, and Health Insurance Licenses

Certified Financial Planner

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.

Chartered Retirement Planning Counselor

Ms. Sheu has the Chartered Retirement Planning Counselor (CRPC) professional designation. 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 Counselor SM 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 Information

There are no legal or disciplinary events that are material to the evaluation of Ms. Sheu.

Item 4: Other Business Activities

Ms. Sheu does not have any outside business activities to report.

Item 5: Additional Compensation

Ms. Sheu does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Ms. Sheu is the sole principal and Chief Compliance Officer and as such has no internal supervision placed over her. She is, however, bound by our firm's Code of Ethics.

Item 7: Requirements for State-Registered Advisers

Ms. Sheu has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, she 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.