

**Item 1: Cover Page for Part 2B of Form ADV:
Brochure Supplement
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Jamie C. Carey

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**Firm Contact:
Jamie Carey
Chief Compliance Officer**

This brochure supplement provides information about Jamie Carey that supplements our brochure. You should have received a copy of that brochure. Please contact Jamie Carey, Chief Compliance Officer, by telephone at (925)406-4186 if you did not receive Carey Consulting Wealth Management, Inc. *dba* Carey Wealth Management's brochure or if you have any questions about the contents of this supplement. Additional information about Jamie Carey is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD# 2638736.

Item 2: Educational Background & Business Experience

Jamie C. Carey

Year of Birth: 1966

Educational Background:

- 1997: The University of Dayton; Masters in Business Administration
- 1988: Ohio State University; Bachelor of Science in Business Administration

Business Background:

- 03/2015 – Present Carey Wealth Management; President, Chief Compliance Officer & Investment Advisor
- 03/2015 – Present Comprehensive Asset Management & Servicing Inc.; Registered Representative
- 01/2007 – 03/2015 LPL Financial, Inc.; Registered Representative & Investment Adviser Representative
- 07/1996 – 01/2007 Nationwide Investment Services Corp; Vice President Sales Manager

Exams, Licenses & Other Professional Designations:

- 2008: Series 24 Exam
- 2007: Certified Financial Planner
- 2007: Series 7 Exam
- 2006: Series 65 Exam
- 2002: Series 63 Exam
- 2001: Series 26 Exam
- 1997: California Life Insurance licensure
- 1995: Series 6 Exam
- 1991: Ohio Certified Public Accountant Licensure - (Not Practicing)

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.

CERTIFIED PUBLIC ACCOUNTANT, CPAs are licensed and regulated by their state boards of accountancy. Experience and testing requirements for licensure as a CPA generally include minimum college education, minimum experience levels, and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of continuing professional education. Additionally, all American Institute of Certified Public Accountants (AICPA) members¹ are required to follow a rigorous *Code of Professional Conduct* which requires that they act with

⁵ This description represents the requirements as of 1/1/2011. It is the responsibility of the adviser to disclose the qualifications in place when he or she attained the credential.

integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to the evaluation of Mr. Carey.

Item 4: Other Business Activities

Mr. Carey 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 and/or our supervised persons may earn.

Mr. Carey is a registered representative of Comprehensive Asset Management & Servicing 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 Mr. Carey may earn.

Item 5: Additional Compensation

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

Item 6: Supervision

Mr. Carey is the President 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. Carey 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.