



THE WEALTH  
CONSERVANCY, INC.

**Part 2B of Form ADV: Brochure Supplement**

Dianna Sary Chiow  
Steven Henningsen  
Brandon A. Mendez  
Myra Salzer  
Katherine Mary Wolf

The Wealth Conservancy, Inc.

Boulder, CO

January 2018

This brochure supplement provides information about the individual(s) listed above that supplements The Wealth Conservancy, Inc. brochure. You should have received a copy of that brochure. Please contact [twc@twcinc.org](mailto:twc@twcinc.org) or call 303-444-1919 if you did not receive The Wealth Conservancy, Inc.'s brochure or if you have any questions about the contents of this supplement.

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

## Item 2 Educational Background and Business Experience

**Full Legal Name:** Dianna Sary Chiow

**Born:** 1962

### Education

- Southern Illinois University; B.S., Marketing; 1984
- Metropolitan State University of Denver; Certificate in Personal Financial Planning; 10/2008

### Business Experience

- The Wealth Conservancy, Inc.; Financial Planner; from 03/2012 to Present
- MML Investors Services Inc.; Registered Representative; from 09/2010 to 02/2012
- Mass Mutual; Agent; from 09/2010 to 02/2012
- New England Securities; Registered Representative; from 10/2009 to 04/2010
- MetLife; Agent; from 10/2009 to 04/2010
- Student in CFP Program at Metro State College; from 01/2007 to 10/2008

### Designations

- Dianna Sary Chiow has earned the following designation(s) and is in good standing with the granting authority:
- Certified Financial Planner™; Certified Financial Planner Board of Standards; 2013

The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience, agree to adhere to the CFP® Board's code of ethics and professional responsibility and financial planning standards and complete 30 hours of continuing education every two years.

## Item 3 Disciplinary Information

Dianna Sary Chiow has no reportable disciplinary history.

## Item 4 Other Business Activities

### A. Investment-Related Activities

1. Dianna Sary Chiow is not engaged in any other investment-related activities.
2. Dianna Sary Chiow does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

### B. Non-Investment-Related Activities

Dianna Sary Chiow is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

## Item 5 Additional Compensation

Dianna Sary Chiow does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## Item 6 Supervision

**Supervisor:** Myra Salzer

**Title:** President

**Phone Number:** (303) 444-1919

Myra Salzer (President, Chief Compliance Officer) and Steve Henningsen (Chief Investment Officer) share responsibility for supervision, formulation and monitoring of investment advice offered to clients. They are also responsible for reviewing and overseeing all material investment policy changes and conducting periodic testing to ensure that client objectives and mandates are being met.

## Item 2 Educational Background and Business Experience

**Full Legal Name:** Steven Henningsen

**Born:** 1966

### **Education**

- College for Financial Planning; CFP; 1997
- University of Massachusetts at Amherst, MA; BBA, Business; 1988

### **Business Experience**

- The Wealth Conservancy, Inc.; Partner/Chief Investment Officer; from 09/2000 to Present

## Item 3 Disciplinary Information

Steven Henningsen has no reportable disciplinary history.

## Item 4 Other Business Activities

### **A. Investment-Related Activities**

1. Steven Henningsen is not engaged in any other investment-related activities.
2. Steven Henningsen does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

### **B. Non-Investment-Related Activities**

Steven Henningsen is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

## Item 5 Additional Compensation

Steven Henningsen does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## Item 6 Supervision

**Supervisor:** Myra Salzer

**Title:** President

**Phone Number:** (303) 444-1919

Myra Salzer (President, Chief Compliance Officer) and Steve Henningsen (Chief Investment Officer) share responsibility for supervision, formulation and monitoring of investment advice offered to clients. They are also responsible for reviewing and overseeing all material investment policy changes and conducting periodic testing to ensure that client objectives and mandates are being met.

## Item 2 Educational Background and Business Experience

**Full Legal Name:** Brandon A. Mendez

**Born:** 1991

### Education

- Eastern Illinois University, Bachelor of Science in Business, 2014

### Business Experience

- The Wealth Conservancy, Inc.; Portfolio Administrator; from 08/2014 to Present
- P.J. Roupas & Associates; Accounting Intern; from 06/2014 to 08/2014
- Palos Country Club; Waiter; from 04/2008 to 07/2014
- Eastern Illinois Booth Library; Student Administrative Assistant; 01/2012 to 05/2014
- Eastern Illinois University; Full-Time Student; 08/2010 to 05/2014
- Patricia Koney and Associates, Ameriprise Financial; Intern; 06/2013 to 01/2014
- Oak Lawn Community High School; Full-Time Student; 08/2006 to 05/2010

### Designations

- Brandon A. Mendez has earned the following designation(s) and is in good standing with the granting authority:
- Certified Financial Planner™; Certified Financial Planner Board of Standards; 2013

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## Item 3 Disciplinary Information

Brandon A. Mendez has no reportable disciplinary history.

## Item 4 Other Business Activities

### A. Investment-Related Activities

1. Brandon A. Mendez is not engaged in any other investment-related activities.
2. Brandon A. Mendez does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

### B. Non-Investment-Related Activities

Brandon A. Mendez is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

## Item 5 Additional Compensation

Brandon A. Mendez does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## Item 6 Supervision

**Supervisor:** Myra Salzer

**Title:** President

**Phone Number:** (303) 444-1919

Myra Salzer (President, Chief Compliance Officer) and Steve Henningsen (Chief Investment Officer) share responsibility for supervision, formulation and monitoring of investment advice offered to clients. They are also responsible for reviewing and overseeing all material investment policy changes and conducting periodic testing to ensure that client objectives and mandates are being met.

## Item 2 Educational Background and Business Experience

**Full Legal Name:** Myra Salzer

**Born:** 1952

### Education

- College for Financial Planning; 1982
- Case Western Reserve University; BS, Chemical Engineering; 1975

### Business Experience

- The Wealth Conservancy, Inc.; President; from 06/1983 to Present

### Designations

Myra Salzer has earned the following designation(s) and is in good standing with the granting authority:

- CFP®; Certified Financial Planner Board of Standards; 1983

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## Item 3 Disciplinary Information

Myra Salzer has no reportable disciplinary history.

## Item 4 Other Business Activities

### A. Investment-Related Activities

1. Myra Salzer is not engaged in any other investment-related activities.
2. Myra Salzer does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

### B. Non-Investment-Related Activities

Myra Salzer is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

## Item 5 Additional Compensation

Myra Salzer does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## Item 6 Supervision

**Supervisor:** n/a

**Title:** n/a

**Phone Number:** (303) 444-1919

Myra Salzer (President, Chief Compliance Officer) and Steve Henningsen (Chief Investment Officer) share responsibility for supervision, formulation and monitoring of investment advice offered to clients. They are also responsible for reviewing and overseeing all material investment policy changes and conducting periodic testing to ensure that client objectives and mandates are being met.

## Item 2 Educational Background and Business Experience

**Full Legal Name:** Katherine Mary Wolf

**Born:** 1981

### Education

- Ohio State University; BFA, Fine Arts; 2004
- Boston University; Certificate in Financial Planning; 2010

### Business Experience

- The Wealth Conservancy, Inc.; Financial Planner; from 07/2014 to Present
- The Wealth Conservancy, Inc.; Senior Portfolio Administrator; from 08/2012 to 06/2014
- Old North Advisors, LLC; Senior Portfolio Administrator; from 03/2007 to 06/2012

### Designations

Katherine Mary Wolf has earned the following designation(s) and is in good standing with the granting authority:

- Certified Financial Planner<sup>™</sup>; Certified Financial Planner Board of Standards, Inc.; 2011

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## Item 3 Disciplinary Information

Katherine Mary Wolf has no reportable disciplinary history.

## Item 4 Other Business Activities

### A. Investment-Related Activities

1. Katherine Mary Wolf is not engaged in any other investment-related activities.
2. Katherine Mary Wolf does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

### B. Non-Investment-Related Activities

Katherine Mary Wolf is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

## Item 5 Additional Compensation

Katherine Mary Wolf does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## Item 6 Supervision

**Supervisor:** Myra Salzer

**Title:** President

**Phone Number:** (303) 444-1919

Myra Salzer (President, Chief Compliance Officer) and Steve Henningsen (Chief Investment Officer) share responsibility for supervision, formulation and monitoring of investment advice offered to clients. They are also responsible for reviewing and overseeing all material investment policy changes and conducting periodic testing to ensure that client objectives and mandates are being met.