



Selective Wealth Management, INC.

Form ADV Part 2B - Individual Disclosure Brochure

for

Kaleb Matson, Investment Adviser Representative

Personal CRD Number: 5964531

Selective Wealth Management, INC.

27 Novmeber 2018

Selective Wealth Management, INC.
Suite 1101
828 Main Street
Lynchburg, Virginia 24504
(434) 515-0578
KMatson@SelectiveWM.com

This brochure supplement provides information about Kaleb Matson that supplements the Selective Wealth Management, INC. brochure. You should have received a copy of that brochure. Please contact Joshua Ryan Standeven, Chief Compliance Officer if you did not receive Selective Wealth Management, INC.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Selective Wealth Management, INC. is also available on the SEC's website at www.adviserinfo.sec.gov. Selective Wealth Management, INC.'s CRD number is: 164882. Selective Wealth Management, INC.'s SEC number is: 801-108568.

Registration does not imply a certain level of skill or training

Connect with Selective > www.selectivewm.com > 434-515-1517

Item 2: Educational Background and Business Experience

Name: Kaleb Matson
Born: 1986

Education Background and Professional Designations:

Education:

Bachelor of Science: Nursing
Liberty University - 2006

Business Background:

08/2013 - Present
Investment Adviser Representative
Selective Wealth Management, INC.

01/2018 – Present
Lux
Owner

10/2012 - Present
Self-employed
InceptionHouse

02/2007 - 06/2015
Registered Nurse
Centra/Carilion

08/2011 - 10/2012
Agent/Broker
CCF Investments

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Kaleb Matson is not engaged in any investment-related business or occupation (other than this advisory firm). Kaleb is the owner and production manager of Inception House - a media creation business and has to allocate five hours per week to the business. Additionally, Kaleb is the owner of Lux, a private arts venture. This endeavor takes up to 40 hours per week.

Item 5: Additional Compensation

Kaleb Matson's compensation comes from a management fee split with Selective Wealth Management, INC. based on any person, company, or organization, Kaleb Matson provides services to.

Item 6: Supervision

Kaleb Matson is supervised by Joshua Ryan Standeven, the CCO for Selective Wealth Management, INC.. Mr. Standeven can be contacted at JStandeven@SelectiveWM.com or by phone at 434-515-1517. Kaleb Matson's contact information is on the cover page of this disclosure document. Kaleb Matson adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.

Item 7: Requirements for State Registered Advisers

This disclosure is required by Virginia securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.

- A. Kaleb Matson has NOT been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - a. an investment or an investment-related business or activity;
 - b. fraud, false statement(s), or omissions;
 - c. theft, embezzlement, or other wrongful taking of property;
 - d. bribery, forgery, counterfeiting, or extortion; or
 - e. dishonest, unfair, or unethical practices.
 2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - a. an investment or an investment-related business or activity;
 - b. fraud, false statement(s), or omissions;
 - c. theft, embezzlement, or other wrongful taking of property;
 - d. bribery, forgery, counterfeiting, or extortion; or
 - e. dishonest, unfair, or unethical practices.
- B. Kaleb Matson has NOT been the subject of a bankruptcy petition at any time.