



# Selective Wealth Management, INC.

## Form ADV Part 2B - Individual Disclosure Brochure

*for*

Shannon Kirkpatrick, Investment Adviser Representative

Personal CRD Number: 6916348

Selective Wealth Management, INC.

27 November 2018

Selective Wealth Management, INC.  
Suite 1101  
828 Main Street  
Lynchburg, Virginia 24504  
(434) 818-1135  
SKirkpatrick@SelectiveWM.com

This brochure supplement provides information about Shannon Kirkpatrick that supplements the Selective Wealth Management, INC. brochure. You should have received a copy of that brochure. Please contact Josh 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](http://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](http://www.selectivewm.com) > 434-515-1517

## Item 2: Educational Background and Business Experience

Name: Shannon Wesley Kirkpatrick  
Born: 1972

### *Education Background and Professional Designations:*

#### Education:

BS Business Administration, University of Illinois – 1995

M.A. Theological Studies, Liberty University – 2011

M.A.R., Liberty University – 2013

#### Business Background:

01/2018 - Present  
Investment Advisor Representative  
Selective Wealth Management, INC.

07/2007 - Present  
Founder/Executive Director  
Rekindling Ministries

01/2011 - 08/2013  
Graduate Assistant  
Liberty University

05/2008 - 12/2010  
Youth Pastor  
Harvest Chinese Christian Church

## 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

Shannon Kirkpatrick is not engaged in any investment-related business or occupation (other than this advisory firm).

## Item 5: Additional Compensation

Other than salary, annual bonuses, or regular bonuses, Shannon Kirkpatrick does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Selective Wealth Management, INC..

## Item 6: Supervision

Shannon Kirkpatrick is supervised by Joshua Standeven, CCO for Selective Wealth Management, INC.. Mr. Standeven can be contacted at JStandeven@SelectiveWM.com or by phone at 434-515-1517. Shannon Kirkpatrick's contact information is on the cover page of this disclosure document. Shannon Kirkpatrick 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. Shannon Kirkpatrick 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. Shannon Kirkpatrick has NOT been the subject of a bankruptcy petition at any time.