

*This brochure supplement provides information about Bernard John Lynch III that supplements the SHP Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Bernard John Lynch III if you did not receive SHP Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Bernard John Lynch III is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **SHP Wealth Management, LLC**

Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Bernard John Lynch III**

Personal CRD Number: 5764980

Investment Adviser Representative

SHP Wealth Management, LLC  
225 Water St Suite C210  
Plymouth, MA 02360  
(508) 746-2400  
[berniel@shpne.com](mailto:berniel@shpne.com)

UPDATED: 04/19/2018

## Item 2: Educational Background and Business Experience

**Name:** Bernard John Lynch III      **Born:**1986

### **Educational Background and Professional Designations:**

#### **Education:**

BA Economics, Stonehill College - 2008

#### **Business Background:**

04/2018 - Present	Investment Adviser Representative SHP Wealth Management, LLC
10/2017 - 04/2018	Unemployed Unemployed
12/2015 - 10/2017	Private Client Advisor Gerstein Fisher
09/2014 - 11/2015	Client Service Associate Edelman Financial
10/2013 - 11/2013	Client Service Manager Adviser Investments
06/2011 - 07/2013	Operations Associate Financial Foundations
01/2010 - 06/2011	Insurance and Operations Associate Gerstein Fisher
06/2005 - 12/2009	Deli Clerk Shaw's Supermarkets

### **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**

Bernard John Lynch III is not engaged in any investment-related business or occupation (other than this advisory firm).

### **Item 5: Additional Compensation**

Bernard John Lynch III does not receive any economic benefit from any person, company, or organization, other than SHP Wealth Management, LLC in exchange for providing clients advisory services through SHP Wealth Management, LLC.

### **Item 6: Supervision**

As a representative of SHP Wealth Management, LLC, Bernard John Lynch III is supervised by Matthew Peck, the firm's Chief Compliance Officer. Matthew Peck is responsible for ensuring that Bernard John Lynch III adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Matthew Peck is (508) 746-2400.