

## **Item 1: Cover Page**

This brochure supplement provides information about Martin M. Meyers that supplements the Meyers Wealth Management, LLC's firm Brochure. You should have received a copy of that brochure. Please contact Matthew Meyers, Chief Compliance Officer, if you did not receive a copy of the Meyers Wealth Management, LLC's firm Brochure or if you have any questions about the content of this supplement. Additional information about Martin M. Meyers is also available on the Securities and Exchange Commission's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You may also call 614-442-6787 or send an email to Matthew Meyers, Chief Compliance Officer, at the following email address: [Matthew@meyerswealthmgmt.com](mailto:Matthew@meyerswealthmgmt.com).

## **Form ADV Part 2B**

*Supplemental Brochure*

# **Meyers Wealth Management, LLC**

**Form ADV, Part 2B – Individual Disclosure Brochure**

**for**

**Martin M. Meyers, CFP<sup>®</sup>**

Owner, and Investment Advisor Representative

CRD No. 2975408

### **Main Office:**

Meyers Wealth Management, LLC

4100 Horizons Drive, Suite 101

Columbus, Ohio 43220

Tele: 614-442-6787

Mobile: 614-506-1098

Email: [Martin@meyerswealthmgmt.com](mailto:Martin@meyerswealthmgmt.com)

**Date: March 29, 2019**

<b>ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE</b>
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<b><u>NAME:</u></b>	Martin M. Meyers
<b><u>BORN:</u></b>	08/1973
<b><u>TITLE:</u></b>	Owner, Investment Advisor Representative of Meyers Wealth Management, LLC
<b><u>EDUCATION:</u></b>	Bachelor of Arts – 1997 The Ohio State University – Columbus, Ohio
<b><u>EXAMINATIONS / LICENSES:</u></b>	Series 7 – General Securities Representative Examination Series 65 – Uniform Investment Adviser Law Examination Series 63 – Uniform Securities Agent State Law Examination  CERTIFIED FINANCIAL PLANNER™ Certified Financial Planner Board of Standards

**CFP® Designation:**

To become certified as a CFP® Professional, one must meet the following requirements in the areas of education, examination, experience, and ethics.

**Education Requirements:**

**The education requirement for attaining CFP® certification includes two main parts:**

1. Complete college or university-level coursework through a program registered with the CFP® Board, addressing the major personal financial planning areas identified by the CFP® Board's most recent Job Analysis Study; and
2. Verify that you hold a regionally accredited college or university bachelor's degree or higher (accreditation must be recognized by U.S. Department of Education at the time the degree is awarded).

**Examination Requirement:**

Pass the CFP® Certification Examination. This is a ten (10) hour examination covering Knowledge, Comprehension/Application, Analysis/Synthesis, and Evaluation.

**Experience Requirement:**

A total of three (3) years full-time qualifying Experience, or the equivalent of six thousand (6,000) hours, is required to satisfy the three (3) year Experience Requirement.

## Form ADV Part 2B – Supplemental Brochure

### Ethics Requirement:

CFP® professionals agree to adhere to the high standards of ethics and practice outlined in the CFP® Board's Standards of Professional Conduct ("Standards") and to acknowledge the CFP® Board's right to enforce them through its Disciplinary Rules and Procedures ("Disciplinary Rules").

### **BUSINESS BACKGROUND**

Employer	Title	Dates
Meyers Wealth Management, LLC Columbus, Ohio	Owner and Investment Advisor Representative	01/2018 – PRESENT
Wells Fargo Clearing Services, LLC Columbus, Ohio	Registered Representative and Investment Advisor Representative	11/2016 – 01/2018
Wells Fargo Advisors, LLC Columbus, Ohio	Investment Advisor Representative	05/2009 – 11/2016
Wachovia Securities, LLC Columbus, Ohio	Registered Representative	07/2007 – 05/2009
Merrill Lynch, Pierce, Fenner & Smith, Inc. Upper Arlington, Ohio	Registered Representative	03/2006 – 07/2007
Advest, Inc. Columbus, Ohio	Registered Representative	08/1997 – 03/2006

### **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**

Martin M. Meyers is licensed as an independent licensed insurance agent with various unaffiliated insurance companies and entities.

**ITEM 5: ADDITIONAL COMPENSATION**

Martin M. Meyers does not receive any economic benefit from any person, company, or organization, in exchange for providing Clients advisory services through Meyers Wealth Management, LLC other than his compensation paid by the Company, i.e., salary and/or bonuses.

Martin M. Meyers receives compensation as a licensed independent insurance agent with various unaffiliated insurance companies and entities.

**ITEM 6: SUPERVISION**

Martin M. Meyers will be supervised by Matthew D. Meyers, Chief Compliance Officer. Matthew Meyers supervises all duties and activities of Martin Meyers. Martin Meyers' contact information is on the cover page of this disclosure document. Mr. Martin Meyers adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the Company's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.