

This brochure supplement provides information about Jason Ray that supplements the Carnegie Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Jason Ray if you did not receive Carnegie Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Jason Ray is also available on the SEC's website at www.adviserinfo.sec.gov.

Carnegie Wealth Management, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Jason Ray

Personal CRD Number: 6204562

Investment Adviser Representative

Carnegie Wealth Management, LLC
920 Cassatt Road, Suite 202
Berwyn, PA 19312
(610) 640-4300
jray@carnegiewealth.com

UPDATED: 03/01/2019

Item 2: Educational Background and Business Experience

Name: Jason Ray **Born:** 1992

Educational Background and Professional Designations:

Education:

Bachelor of Arts Politics, Princeton University - 2014

Business Background:

06/2018 - Present	Investment Adviser Representative Carnegie Wealth Management, LLC
03/2018 - Present	Registered Representative Strategic Financial Alliance
03/2018 - Present	Investment Adviser Representative Strategic Financial Alliance
03/2016 - 03/2018	Consultant FS Investment Solutions LLC
06/2015 - 03/2016	Associate FS Investment Solutions LLC
06/2014 - 05/2015	Associate Lincoln Financial Distributors
06/2010 - 06/2014	NA Student
06/2013 - 08/2013	Annuities Intern Lincoln Financial Distributors
06/2012 - 08/2012	Sales and Marketing Intern Varsity Software
06/2011 - 08/2011	Marketing Intern Choose New Jersey

06/2011 - 08/2011	Recap Specialist - Intern Firestone Library
08/2006 - 06/2010	NA Student
04/2010 - 06/2010	Intern IHS Global Insight

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

Jason Ray is a registered representative for Strategic Financial Alliance. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Carnegie Wealth Management, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Carnegie Wealth Management, LLC in such individual's outside capacity.

Jason Ray as an investment advisor representative ("IAR") with The Strategic Financial Alliance ("SFA") a registered investment advisor with the U.S. Securities and Exchange Commission ("SEC"). In his separate capacity as an IAR of SFA, Jason Ray will receive advisory fees for Clients whose accounts and relationships are serviced under SFA. Jason Ray will not receive ongoing investment advisory fees from SFA for each of these accounts, once each each account is transitioned to Carnegie Wealth Management, LLC acting in its capacity as a registered investment advisor.

Jason Ray is an Advisory Council for Gateway to Leadership Foundation. From time to time, he may offer clients advice or products from those activities and clients should be aware that these services may involve a conflict of interest. Carnegie Wealth Management, LLC always acts in the best interest of the client and clients always have the right to decide whether or not to utilize the services of any representative of Carnegie Wealth Management, LLC in such individual's outside capacities.

Item 5: Additional Compensation

Jason Ray does not receive any economic benefit from any person, company, or organization, other than Carnegie Wealth Management, LLC in exchange for providing clients advisory services through Carnegie Wealth Management, LLC.

Item 6: Supervision

As a representative of Carnegie Wealth Management, LLC, Jason Ray is supervised by Scott T Sheffer, the firm's Chief Compliance Officer. Scott T Sheffer is responsible for ensuring that Jason Ray 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 Scott T Sheffer is (610) 640-4300.

Item 7: Requirements For State Registered Advisers

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

A. Jason Ray 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. Jason Ray has NOT been the subject of a bankruptcy.