



# Robasciotti & Philipson

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## RACHEL J. ROBASCIOTTI

This brochure supplement provides information about Rachel J. Robasciotti that supplements the Robasciotti & Philipson brochure. You should have received a copy of that brochure. Please contact Chief Compliance Officer, Cassandra “Sandy” Holmes, if you did not receive Robasciotti & Philipson’s brochure or if you have any questions about the contents of this supplement. Additional information about Rachel J. Robasciotti is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).



## Item 2 – Educational Background and Business Experience

**Rachel Joyce Robasciotti**

Year Born: 1979

### **Educational Background**

Bachelor of Arts, Political Economy – University of California, Berkeley (2001)

### **Business Background**

July 2004 – Present: Principal & Wealth Manager, Robasciotti & Philipson

### **Professional Qualifications**

Series 7, General Securities Representative Examination (2002)

Series 66, Uniform Combined State Law Examination (2002)

## Item 3 – Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this item for Rachel J. Robasciotti.

## Item 4 – Other Business Activities

Other than for Robasciotti & Philipson, Rachel J. Robasciotti receives no investment-related compensation nor is she actively engaged in any other business or occupation for compensation that provides a substantial source of income.

## Item 5 – Additional Compensation

Rachel J. Robasciotti does not receive commissions, performance based fees, or any compensation other regular salary, bonuses, and shareholder draws from Robasciotti & Philipson.

## Item 6 – Supervision

Robasciotti & Philipson has appointed a Chief Compliance Officer, Cassandra “Sandy” Holmes, who reviews and monitors employee activity with respect to the rules and regulations. In addition, Robasciotti & Philipson has adopted a Code of Ethics that requires each employee to act in the best interest of clients at all times. Should you have questions related to these activities, please contact Cassandra “Sandy” Holmes at the address or telephone number on the cover page of this document.