



Form ADV Part 2B – Brochure Supplement

for

**Robert M. Hagopian
Financial Advisor**

Effective: November 21, 2019

This Form ADV 2B ("Brochure Supplement") provides information about the background and qualifications of Robert M. Hagopian (CRD# 4372053) in addition to the information contained in the Ivy Wealth Management, Inc. ("IWM" or the "Advisor", CRD# 164557) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the IWM Disclosure Brochure or this Brochure Supplement, please contact us at (401) 681-4266 or by email at info@ivywealth.net.

Additional information about Mr. Hagopian is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 4372053.

Item 2 – Educational Background and Business Experience

Robert M. Hagopian, born in 1957, is dedicated to advising Clients of IWM as a Financial Advisor. Mr. Hagopian also attended Boston College. Additional information regarding Mr. Hagopian's employment history is included below.

Employment History:

Financial Advisor, Ivy Wealth Management, Inc.	12/2016 to Present
Wealth Management Advisor, Bank of America, NA	09/2009 to 12/2016
Financial Advisor, Merrill Lynch, Pierce, Fenner & Smith Inc.	06/2001 to 12/2016

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Mr. Hagopian. Mr. Hagopian has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Hagopian.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and /or dishonest, unfair or unethical practices. *As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Hagopian.* However, we do encourage you to independently view the background of Mr. Hagopian on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 4372053.

Item 4 – Other Business Activities

Insurance Agency Affiliations

Mr. Hagopian is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart Mr. Hagopian's role with IWM. As an insurance professional, Mr. Hagopian may receive customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Hagopian is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This may cause a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Hagopian or the Advisor.

Item 5 – Additional Compensation

Mr. Hagopian has additional business activities that are detailed in Item 4 above.

Item 6 – Supervision

Mr. Hagopian serves as a Financial Advisor of IWM and is supervised by Brad Ingegneri, the Chief Compliance Officer. Brad Ingegneri can be reached at (401) 681-4266.

IWM has implemented a Code of Ethics and internal compliance that guide each Supervised Person in meeting their fiduciary obligations to Clients of IWM. Further, IWM is subject to regulatory oversight by various agencies. These agencies require registration by IWM and its Supervised Persons. As a registered entity, IWM is subject to examinations by regulators, which may be announced or unannounced. IWM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.