

Form ADV Part 2B – Brochure Supplement

for

**Benedict J. Ingegneri
Estate Planning Specialist**

Effective: November 21, 2019

This Form ADV 2B ("Brochure Supplement") provides information about the background and qualifications of Benedict J. Ingegneri (CRD# 1136862) 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. Ingegneri 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# 1136862.

Item 2 – Educational Background and Business Experience

Benedict J. Ingegneri, born in 1946, is dedicated to advising Clients of IWM as the Estate Planning Specialist. Mr. Ingegneri also earned a BS in Business Administration from Bryant College in 1972. Additional information regarding Mr. Ingegneri's employment history is included below.

Employment History:

Estate Planning Specialist, Ivy Wealth Management, Inc.	02/2018 to Present
Financial Advisor, Bay State Financial	05/2003 to 01/2018

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Mr. Ingegneri. Mr. Ingegneri 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. Ingegneri.

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. Ingegneri.*

However, we do encourage you to independently view the background of Mr. Ingegneri on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 1136862.

Item 4 – Other Business Activities

Insurance Agency Affiliations

Mr. Ingegneri is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart from Mr. Ingegneri's role with IWM. As an insurance professional, Mr. Ingegneri may receive customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Ingegneri 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. Ingegneri or the Advisor.

Item 5 – Additional Compensation

Mr. Ingegneri has additional business activities where compensation is received that are detailed in Item 4 above.

Item 6 – Supervision

Benedict Ingegneri serves as the Estate Planning Specialist of IWM and is supervised by Todd Sadwin, the Chief Compliance Officer. Mr. Sadwin can be reached at (401) 681-4266.

IWM has implemented a Code of Ethics, an internal compliance document 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.