



# Selective Wealth Management, INC.

## Form ADV Part 2B - Individual Disclosure Brochure

*for*

Brian Liedstrand, Investment Adviser Representative

Personal CRD Number: 6339738

Selective Wealth Management, INC.

March 1, 2018

Selective Wealth Management, INC.  
Suite 1101  
828 Main Street  
Lynchburg, Virginia 24504  
(910) 939-0726  
BLiedstrand@SelectiveWM.com

This brochure supplement provides information about Brian Liedstrand that supplements the Selective Wealth Management, INC. brochure. You should have received a copy of that brochure. Please contact Joshua Ryan Standeven, Chief Compliance Officer if you did not receive Selective Wealth Management, INC.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Selective Wealth Management, INC. is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Selective Wealth Management, INC.'s CRD number is: 164882. Selective Wealth Management, INC.'s SEC number is: 801-108568.

Registration does not imply a certain level of skill or training

**Connect with Selective** > [www.selectivewm.com](http://www.selectivewm.com) > 434-515-1517

## Item 2: Educational Background and Business Experience

Name: Brian Thomas Liedstrand  
Born: 1984

### *Education Background and Professional Designations:*

#### Education:

BA Music Ministry  
Liberty University – 2007

Private Pilot  
Dulles Aviation Part 141 - 2008

#### Business Background:

05/2014 - Present  
Investment Adviser Representative  
Selective Wealth Management, INC.

03/2017 - Present  
USMC: Reserves

01/2014 - Present  
Music Director  
Harvest Presbyterian Church PCA

01/2014 - 11/2016  
District Injured Support Coordinator  
USMC

10/2012 - 12/2013  
Worship Leader/Music Director  
Oasis Church

09/2007 - 10/2012  
Air Support Control Officer  
USMC Active Duty

## 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

Brian Liedstrand is not engaged in any investment-related business. Brian works for Harvest Presbyterian Church as a music director, but his work there does not hinder any other activities. Additionally, Brian is in the USMC Reserves and commits approximately 16 hours per month to this service. His work with the USMC does not hinder his IAR duties or activities.

## Item 5: Additional Compensation

Brian Liedstrand's compensation comes from a management fee split with Selective Wealth Management, INC. based on any person, company, or organization, Brian Liedstrand provides services to.

## Item 6: Supervision

Brian Liedstrand is supervised by Joshua Ryan Standeven, the CCO for Selective Wealth Management, INC.. Mr. Standeven can be contacted at JStandeven@SelectiveWM.com or by phone at 434-515-1517. Brian Liedstrand's contact information is on the cover page of this disclosure document. Brian Liedstrand adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.

## Item 7: Requirements for State Registered Advisers

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

- A. Brian Liedstrand 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. Brian Liedstrand has NOT been the subject of a bankruptcy petition at any time.