

**Item 1. Cover Page**

**GLASSMAN WEALTH MANAGEMENT LLC**

47 Tamarack Place  
Briarcliff Manor, NY 10510

Telephone: (914) 629-3694

**JAY GLASSMAN**

[jay.t.glassman@gmail.com](mailto:jay.t.glassman@gmail.com)

Part 2B of Form ADV: Brochure Supplement  
January 5, 2023

**This brochure supplement provides information about Jay Glassman (the “Supervised Person”) that supplements the Glassman Wealth Management LLC (“GWM”) brochure. Please contact GWM at (914) 629-3694 if you have any questions about the contents of this supplement.**

## **Item 2. Educational Background and Business Experience**

Jay Glassman, born in Queens, NY in 1955, holds a Master's Degree in Business Administration, with a Major in Finance from the NYU Leonard Stern School of Business (1979). He also holds a Bachelor of Science Degree, with a major in Labor Economics from Cornell University (1977).

Mr. Glassman has been a financial advisor since 2009. In 2011, he formed GWM through which he now provides his advisory services. From 1993 to 2008, Mr. Glassman was an executive at McMahan Securities Co., LP, a brokerage firm in Greenwich, CT that specialized in convertible securities. Mr. Glassman began his time at McMahan as Director of Research, and beginning in 1995, added the position of Chairman of the Executive Committee. From 1999-2008 Mr. Glassman was also Chairman of the Investment Committee for the Argent Funds Group, a hedge fund that specialized in convertible arbitrage.

## **Item 3. Disciplinary Information**

None.

## **Item 4. Other Business Activities**

The Supervised Person does not (i) actively engage in any investment-related business or occupation other than the business of GWM, (ii) engage in any other financial industry activity that creates a material conflict of interest with GWM, (iii) receive commissions, bonuses or other compensation based on the sale of securities or other investment products or (iv) actively engage in any other business or occupation for compensation that provides a substantial source of his income or that involves a substantial amount of his time.

## **Item 5. Additional Compensation**

The only persons or entities that provide an economic benefit to the Supervised Person for providing advisory services are the separate accounts to which GWM provides investment management services ("Clients").

## **Item 6. Supervision**

The Supervised Person is subject to GWM's code of ethics and compliance policies and procedures. The only Supervised Person is Jay Glassman, the president of GWM. Mr. Glassman is the only person who provides investment advice on behalf of GWM to Clients. His telephone number is listed in Item 1.

## **Item 7. Requirements for State-Registered Advisers**

Item 7 is not applicable.