

**Item 1: Cover Page**  
**Part 2B of Form ADV: Brochure Supplement**  
**September 2024**

**Richard J. Villosis**

**Carnegie Wealth Management LLC**  
**738 Berkshire Ave**  
**La Canada, CA 91011**

**Firm Contact:**  
**Richard Villosis**  
**Chief Compliance Officer**

This brochure supplement provides information about Mr. Villosis that supplements our brochure. You should have received a copy of that brochure. Please contact Craig Alexander if you did not receive Carnegie Wealth Management LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Villosis is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #4217642.

## Item 2: Educational Background & Business Experience

**Richard J. Villosis**  
**Year of Birth:** 1973

### **Educational Background:**

- 1996: Loyola Marymount University; Bachelor of Science in Biology

### **Business Background:**

- 04/2024 – Present      Carnegie Wealth Management LLC; Member
- 07/2005 – Present      Marathon Petroleum Corporation; Process Specialist
- 02/2017 – 01/2024      Western International Securities, Inc.; Client Service Associate

### **Exams, Licenses & Other Professional Designations:**

- 2018 – Securities Industry Essentials (SIE) Exam
- 2016 – Series 7 & Series 66 Exams
- 2002 – Series 63 Exam

## Item 3: Disciplinary Information

There are no legal or disciplinary events material to your evaluation of Mr. Villosis.

## Item 4: Other Business Activities

Mr. Villosis has nothing to disclose in this regard.

## Item 5: Additional Compensation

Mr. Villosis does not receive any other economic benefit for providing advisory services in addition to advisory fees.

## Item 6: Supervision

Craig Alexander, Chief Compliance Officer of Carnegie Wealth Management LLC, supervises and monitors Mr. Villosis' activities on a regular basis to ensure compliance with our firm's Code of Ethics. Additionally, Mr. Villosis supervises and monitors Mr. Kochavi pursuant to the Agreement of Undertaking that Mr. Kochavi signed with the California Department of Financial Protections and

Innovation. Please contact Craig Alexander if you have any questions about Mr. Villosis' brochure supplement at 818-679-2724.

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

Mr. Villosis has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.