

Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
April 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 Richard Villosis 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 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; Chief Compliance Officer
- 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

Doron Kochavi is a principal of Carnegie Wealth Management LLC and as such supervises and monitors Mr. Villosis' activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Doron Kochavi if you have any questions about Mr. Villosis' brochure supplement at 818-679-2724.