

## **DISCLOSURE BROCHURE**

**Brian O. Gloe**

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This brochure provides information about Brian O. Gloe that supplements the Craft & Sage Wealth brochure. You should have received a copy of that brochure.

Additional information about Brian O. Gloe is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

**March 2024**

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

**Brian O. Gloe**

Date of Birth: 1960

### **Education:**

Bachelor of Business Administration in Accounting, Rockhurst University, Kansas City KS, 1985

### **Business Background:**

Investment Advisory Representative, Craft & Sage Wealth, LLC, June 2023 - Present  
Investment Advisor Representative, Premier Financial Partners, March 2017 - June 2023  
Registered Representative, Royal Alliance Associates, March 2017 – June 2023  
Agent, MassMutual Life Insurance Company, July 2011 - March 2017  
Registered Representative, MML Investor Services, Group July 2011 - March 2017

## **Item 3 Disciplinary Information**

Mr. Gloe has no disciplinary history.

## **Item 4 Other Business Activities**

Mr. Gloe is also an agent of Craft and Sage Risk Management, LLC. As such, your advisor may recommend the purchase of insurance products through this affiliation. Mr. Gloe is also an insurance agent and receives commission on the sale of insurance products.

## **Item 5 Additional Compensation**

As discussed previously above, Mr. Gloe is an Investment Advisor Representative and an insurance agent. In addition to the receipt of advisory fees and insurance commissions, he may receive compensation permitted under applicable law. As a result, these affiliations create a conflict of interest. While Mr. Gloe intends to provide recommendations of products and services, he believes are suitable for you, you should carefully evaluate each product or service recommendation based on your own financial situation and investment objectives. The client always has the right to decide whether to act on Craft & Sage's financial planning recommendations. If clients decide to act on recommendations, they always have the right to select the investment professional through whom they will do so.

## **Item 6 Supervision**

Mr. John T. Christy, CFP®, is the main officer in charge of supervising Mr. Gloe and the advisory activities at Craft & Sage Wealth. Craft & Sage Wealth also employs Mrs. Megan Brenner, CFP®, Co-Founder, who assists Mr. Christy in supervising advisory activities at Craft & Sage Wealth.

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

As stated in *Item 3* of this Brochure Supplement, Mr. Gloe has no disciplinary history, nor does have any disclosures applicable to this item.