

## **Bryan Krill**

Wacker Wealth Partners, LLC

Brochure Supplement

Dated January 1, 2024

Contact: Sarah Pazdan, Chief Compliance Officer  
892 Aerovista Place, Suite 220  
San Luis Obispo, California 93401  
[www.wackerwealthpartners.com](http://www.wackerwealthpartners.com)

**This Brochure Supplement provides information about Bryan Krill that supplements the Wacker Wealth Partners, LLC Brochure; you should have received a copy of that Brochure. Please contact Sarah Pazdan, Chief Compliance Officer, if you did *not* receive Wacker Wealth Partners, LLC 's Brochure or if you have any questions about the contents of this supplement.**

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

### **Education Background and Business Experience**

Bryan Krill was born in 1973. Mr. Krill graduated from The University of Southern California's Marshall School of Business in 1996, with a degree in Business. Mr. Krill has served as Chief Compliance Officer, Chief Financial Officer and Chief Operating Officer of Wacker Wealth Partners, LLC since January of 2008. From March of 1999 to January of 2008 Mr. Krill served as Managing Partner of REW Inc.

Mr. Krill has been a CERTIFIED FINANCIAL PLANNER™ professional since 2002. Certified Financial Planner Board of Standards, Inc. ("CFP Board") owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with flame design) logo in the United States (these marks are collectively referred to as the "CFP® marks"). The CFP Board authorizes use of the CFP® marks by individuals who successfully complete the CFP Board's initial and ongoing certification requirements.

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 88,000 individuals have obtained CFP® certification.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete a college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services or an accepted equivalent, including [completion of a financial plan development capstone course](#), and attain a Bachelor’s Degree from an accredited college or university. CFP Board’s financial planning subject areas include professional conduct and regulation, general principles of financial planning, education planning, risk management and insurance planning, investment planning, income tax planning, retirement savings and income planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 6 hours, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – CFP Board requires 6,000 hours of experience through the Standard Pathway, or 4,000 hours of experience through the Apprenticeship Pathway that meets additional requirements ; and
- Ethics – Agree to be bound by CFP Board’s *Code of Ethics and Standards of Conduct*, which put clients’ interest first; acknowledge CFP Board’s right to enforce them through its *Disciplinary Rules and Procedures*; comply with the *Financial Planning Practice Standards* which determine what clients should reasonably expect from the financial planning engagement and complete a CFP® Certification Application which requires disclosure of an individual’s background, including involvement in any criminal, civil, governmental, or self-regulatory agency proceeding or inquiry, bankruptcy, customer complaint, filing, termination/internal reviews conducted by the individual’s employer or firm.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours accepted by the CFP Board every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – CFP® professionals agree to adhere to the high standards of ethics and practice outlined in CFP Board’s Code of Ethics and Standards of Conduct and to acknowledge

CFP Board's right to enforce them through its Disciplinary Rules and Procedures. The Code of Ethics and Standards of Conduct require that CFP Professionals provide financial planning services in the best interests of their clients.

- Certification Application – Properly complete a Certification Application to (i) acknowledge voluntary adherence to the [terms and conditions of certification with CFP Board](#) and (ii) disclose any involvement in criminal and civil proceedings, inquiries or investigations, bankruptcy filings, internal reviews and customer complaints.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

You may [verify an individual's CFP®](#) certification and background through the CFP Board. The verification function will allow you to verify an individual's certification status, CFP Board's disciplinary history and any bankruptcy disclosures in the past ten years. Additional regulatory information may also be found through [FINRA'S BrokerCheck](#) and the [SEC's Investment Adviser Public Disclosure databases](#), which are free tools that may be used to conduct research on the background and experience of CFP® professionals and those who held CFP® certification at one time, including with respect to employment history, regulatory actions, and investment-related licensing information, arbitrations, and complaints.

### **Disciplinary Information**

None.

### **Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### **Additional Compensation**

Mr. Krill is eligible for bonuses that are based on the number of clients that Mr. Krill introduces to the Registrant as well as the addition of material assets by current clients. Accordingly, Mr. Krill has an incentive to attract new clients and have clients add additional assets to their accounts with the Registrant.

## **Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, Sarah Pazdan, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Ms. Pazdan at (805) 541-1308.

## **Patrick O'Hara**

Wacker Wealth Partners, LLC

Brochure Supplement

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892 Aerovista Place, Suite 220  
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**This Brochure Supplement provides information about Patrick O'Hara that supplements the Wacker Wealth Partners, LLC Brochure; you should have received a copy of that Brochure. Please contact Sarah Pazdan, Chief Compliance Officer, if you did *not* receive Wacker Wealth Partners, LLC's Brochure or if you have any questions about the contents of this supplement.**

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

### **Education Background and Business Experience**

Patrick O'Hara was born in 1965. Mr. O'Hara graduated from Stanford University in 1987, with a degree in Economics. Mr. O'Hara has been employed as a Wealth Advisor of Wacker Wealth Partners, LLC since January of 2008. From October of 2006 to January of 2008 Mr. O'Hara was employed as a Senior Advisor of REW Inc. From November of 2004 to September of 2006, Mr. O'Hara was employed as a registered representative of Uvest Financial Services.

Mr. O'Hara has been a CERTIFIED FINANCIAL PLANNER™ professional since 2002. Certified Financial Planner Board of Standards, Inc. ("CFP Board") owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with flame design) logo in the United States (these marks are collectively referred to as the "CFP® marks"). The CFP Board authorizes use of the CFP® marks by individuals who successfully complete the CFP Board's initial and ongoing certification requirements.

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### **Disciplinary Information**

None.

### **Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### **Additional Compensation**

Mr. O'Hara is eligible for bonuses that are based on the number of clients that Mr. O'Hara introduces to the Registrant as well as the addition of material assets by current clients. Accordingly, Mr. O'Hara has an incentive to attract new clients and have clients add additional assets to their accounts with the Registrant.

## **Supervision**

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## **Matt Wilson**

Wacker Wealth Partners, LLC

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### **Education Background and Business Experience**

Matt Wilson was born in 1972. Mr. Wilson graduated from California Polytechnic State University in 1995, with a degree in Biological Science. Mr. Wilson graduated from California Polytechnic State University in 1999, with a Masters in Business Administration degree in Finance. Mr. Wilson has been employed as a Wealth Advisor of Wacker Wealth Partners, LLC since January of 2008. From May of 2005 to January of 2008 Mr. Wilson was employed as an Investment Specialist of REW Inc.

Mr. Wilson has been a CERTIFIED FINANCIAL PLANNER™ professional since 2007. Certified Financial Planner Board of Standards, Inc. ("CFP Board") owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with flame design) logo in the United States (these marks are collectively referred to as the "CFP® marks"). The CFP Board authorizes use of the CFP® marks by individuals who successfully complete the CFP Board's initial and ongoing certification requirements.

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### **Disciplinary Information**

None.

### **Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### **Additional Compensation**

Mr. Wilson is eligible for bonuses that are based on the number of clients that Mr. Wilson introduces to the Registrant as well as the addition of material assets by current clients. Accordingly, Mr. Wilson has an incentive to attract new clients and have clients add additional assets to their accounts with the Registrant.

### **Supervision**

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## **Ryan Caldwell**

Wacker Wealth Partners, LLC

Brochure Supplement

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892 Aerovista Place, Suite 220  
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### **Education Background and Business Experience**

Ryan Caldwell was born in 1979. Mr. Caldwell graduated from California Polytechnic State University in 2002, with a degree in Biology. Mr. Caldwell has been employed as a Wealth Advisor of Wacker Wealth Partners, LLC since January of 2008 and has been the Chief Executive Officer and Managing Member since February 2018. From December of 2007 to January of 2008, Mr. Caldwell was employed as a Financial Planning Associate of REW Inc. From October of 2003 to November of 2007, Mr. Caldwell was employed as a manger of client services of Fisher Investments.

Mr. Caldwell has been a CERTIFIED FINANCIAL PLANNER™ professional since 2008. Certified Financial Planner Board of Standards, Inc. ("CFP Board") owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with flame design) logo in the United States (these marks are collectively referred to as the

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### **Disciplinary Information**

None.

### **Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### **Additional Compensation**

Mr. Caldwell is eligible for bonuses that are based on the number of clients that Mr. Caldwell introduces to the Registrant as well as the addition of material assets by current clients. Accordingly, Mr. Caldwell has an incentive to attract new clients and have clients add additional assets to their accounts with the Registrant.

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## **Education Background and Business Experience**

Joan Wenglikowski was born in 1960. Ms. Wenglikowski graduated from Ferris State University in 1982, with a degree in Business. Ms. Wenglikowski has been employed as a Wealth Advisor of Wacker Wealth Partners, LLC since January of 2008. From January of 2007 to January of 2008, Ms. Wenglikowski was employed as a Financial Planning Associate of REW Inc. From December of 2001 to January of 2007, Ms. Wenglikowski was employed as a personal assistant to the Board Chairman of O'Neill Inc.

Ms. Wenglikowski has been a CERTIFIED FINANCIAL PLANNER™ professional since 2008. Certified Financial Planner Board of Standards, Inc. ("CFP Board") owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with flame design) logo in the United States (these marks are collectively referred to as the "CFP® marks"). The CFP Board authorizes use of the CFP® marks by individuals who successfully complete the CFP Board's initial and ongoing certification requirements.

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- Certification Application – Properly complete a Certification Application to (i) acknowledge voluntary adherence to the [terms and conditions of certification with CFP Board](#) and (ii) disclose any involvement in criminal and civil proceedings, inquiries or investigations, bankruptcy filings, internal reviews and customer complaints.

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You may [verify an individual's CFP®](#) certification and background through the CFP Board. The verification function will allow you to verify an individual's certification status, CFP Board's disciplinary history and any bankruptcy disclosures in the past ten years. Additional regulatory information may also be found through [FINRA'S BrokerCheck](#) and the [SEC's Investment Adviser Public Disclosure databases](#), which are free tools that may be used to conduct research on the background and experience of CFP® professionals and those who held CFP® certification at one time, including with respect to employment history, regulatory actions, and investment-related licensing information, arbitrations, and complaints.

### **Disciplinary Information**

None.

### **Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### **Additional Compensation**

Ms. Wenglikowski is eligible for bonuses that are based on the number of clients that Ms. Wenglikowski introduces to the Registrant as well as the addition of material assets by current clients. Accordingly, Ms. Wenglikowski has an incentive to attract new clients and have clients add additional assets to their accounts with the Registrant.

### **Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance

Officer, Sarah Pazdan, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Ms. Pazdan at (805) 541-1308.

## **Megan A. Carden**

Wacker Wealth Partners, LLC

Brochure Supplement

Dated January 1, 2024

Contact: Sarah Pazdan, Chief Compliance Officer  
892 Aerovista Place, Suite 220  
San Luis Obispo, California 93401  
[www.wackerwealthpartners.com](http://www.wackerwealthpartners.com)

**This Brochure Supplement provides information about Megan A. Carden that supplements the Wacker Wealth Partners, LLC Brochure; you should have received a copy of that Brochure. Please contact Sarah Pazdan, Chief Compliance Officer, if you did *not* receive Wacker Wealth Partners, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Megan A. Carden is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

### **Education Background and Business Experience**

Megan A. Carden was born in 1991. Ms. Carden graduated from Lees-McRae College in 2013, with a Bachelor of Science degree in Business Administration with concentrations in Finance & Marketing and minor in Psychology. Ms. Carden has been employed as a Wealth Planning Analyst of Wacker Wealth Partners, LLC since August of 2015 and been a Wealth Management Advisor since 2017. From May 2012 through July 2012, Ms. Carden was a Marketing Intern with Brica, Inc. From July 2013 through July 2015, Ms. Carden was a Credit Analyst with Heritage Oak Bank.

Ms. Carden has been a CERTIFIED FINANCIAL PLANNER™ professional since 2016. Certified Financial Planner Board of Standards, Inc. ("CFP Board") owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with flame design) logo in the United States (these marks are collectively referred to as the

“CFP® marks”). The CFP Board authorizes use of the CFP® marks by individuals who successfully complete the CFP Board’s initial and ongoing certification requirements.

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 88,000 individuals have obtained CFP® certification.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete a college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services or an accepted equivalent, including [completion of a financial plan development capstone course](#), and attain a Bachelor’s Degree from an accredited college or university. CFP Board’s financial planning subject areas include professional conduct and regulation, general principles of financial planning, education planning, risk management and insurance planning, investment planning, income tax planning, retirement savings and income planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 6 hours, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – CFP Board requires 6,000 hours of experience through the Standard Pathway, or 4,000 hours of experience through the Apprenticeship Pathway that meets additional requirements ; and
- Ethics – Agree to be bound by CFP Board’s *Code of Ethics and Standards of Conduct*, which put clients’ interest first; acknowledge CFP Board’s right to enforce them through its *Disciplinary Rules and Procedures*; comply with the *Financial Planning Practice Standards* which determine what clients should reasonably expect from the financial planning engagement and complete a CFP® Certification Application which requires disclosure of an individual’s background, including involvement in any criminal, civil, governmental, or self-regulatory agency proceeding or inquiry, bankruptcy, customer complaint, filing, termination/internal reviews conducted by the individual’s employer or firm.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours accepted by the CFP Board every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and

- Ethics – CFP® professionals agree to adhere to the high standards of ethics and practice outlined in CFP Board’s Code of Ethics and Standards of Conduct and to acknowledge CFP Board’s right to enforce them through its Disciplinary Rules and Procedures. The Code of Ethics and Standards of Conduct require that CFP Professionals provide financial planning services in the best interests of their clients.
- Certification Application – Properly complete a Certification Application to (i) acknowledge voluntary adherence to the [terms and conditions of certification with CFP Board](#) and (ii) disclose any involvement in criminal and civil proceedings, inquiries or investigations, bankruptcy filings, internal reviews and customer complaints.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

You may [verify an individual's CFP®](#) certification and background through the CFP Board. The verification function will allow you to verify an individual’s certification status, CFP Board’s disciplinary history and any bankruptcy disclosures in the past ten years. Additional regulatory information may also be found through [FINRA’S BrokerCheck](#) and the [SEC’s Investment Adviser Public Disclosure databases](#), which are free tools that may be used to conduct research on the background and experience of CFP® professionals and those who held CFP® certification at one time, including with respect to employment history, regulatory actions, and investment-related licensing information, arbitrations, and complaints.

### **Disciplinary Information**

None.

### **Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### **Additional Compensation**

Ms. Carden is eligible for bonuses that are based on the number of clients that Ms. Carden introduces to the Registrant as well as the addition of material assets by current clients. Accordingly, Ms. Carden has an incentive to attract new clients and have clients add additional assets to their accounts with the Registrant.

### **Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant’s policies and procedures manual. The primary purpose of the Registrant’s Rule

206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the “Act”). The Registrant’s Chief Compliance Officer, Sarah Pazdan, is primarily responsible for the implementation of the Registrant’s policies and procedures and overseeing the activities of the Registrant’s supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant’s supervision or compliance practices, please contact Ms. Pazdan at (805) 541-1308.



# **Norman Dillon McGill**

Wacker Wealth Partners, LLC

Brochure Supplement

Dated January 1, 2024

Contact: Sarah Pazdan, Chief Compliance Officer  
892 Aerovista Place, Suite 220  
San Luis Obispo, California 93401  
[www.wackerwealthpartners.com](http://www.wackerwealthpartners.com)

**This Brochure Supplement provides information about Norman D. McGill that supplements the Wacker Wealth Partners, LLC Brochure; you should have received a copy of that Brochure. Please contact Sarah Pazdan, Chief Compliance Officer, if you did *not* receive Wacker Wealth Partners, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Norman D. McGill is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## **Education Background and Business Experience**

Dillon McGill was born in 1984. Mr. McGill graduated from California Polytechnic State University in 2010, with a Bachelor of Science degree in Kinesiology. Mr. McGill has also earned professional certificates in Professional Financial Planning, and Accounting from University of California Santa Barbara's University Extension.

Mr. McGill has been employed as a Wealth Advisor of Wacker Wealth Partners, LLC since March of 2020. From September 2019 to February 2020, Mr. McGill was Manager of Financial Planning and a Financial Advisor at Parkside Advisors (formerly Grubman Wealth Management) in Berkeley, CA. His prior roles at Parkside Advisors include Senior Associate, Financial Advisor (from July 2018 to September 2019), Wealth Manager (from December 2016 to July 2018), and Associate Wealth Manager (from February 2016 to December 2016). From October 2010 through December 2015, Mr. McGill was an Operations Assistant with Vivid Financial Management (formerly Woodland Leishman & Associates) in Orcutt, CA.

Mr. McGill is a CERTIFIED FINANCIAL PLANNER™ professional. Certified Financial Planner Board of Standards, Inc. (“CFP Board”) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with flame design) logo in the United States (these marks are collectively referred to as the “CFP® marks”). The CFP Board authorizes use of the CFP® marks by individuals who successfully complete the CFP Board’s initial and ongoing certification requirements.

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 88,000 individuals have obtained CFP® certification.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete a college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services or an accepted equivalent, including [completion of a financial plan development capstone course](#), and attain a Bachelor’s Degree from an accredited college or university. CFP Board’s financial planning subject areas include professional conduct and regulation, general principles of financial planning, education planning, risk management and insurance planning, investment planning, income tax planning, retirement savings and income planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 6 hours, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – CFP Board requires 6,000 hours of experience through the Standard Pathway, or 4,000 hours of experience through the Apprenticeship Pathway that meets additional requirements ; and
- Ethics – Agree to be bound by CFP Board’s *Code of Ethics and Standards of Conduct*, which put clients’ interest first; acknowledge CFP Board’s right to enforce them through its *Disciplinary Rules and Procedures*; comply with the *Financial Planning Practice Standards* which determine what clients should reasonably expect from the financial planning engagement and complete a CFP® Certification Application which requires disclosure of an individual’s background, including involvement in any criminal, civil, governmental, or self-regulatory agency proceeding or inquiry, bankruptcy, customer complaint, filing, termination/internal reviews conducted by the individual’s employer or firm.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours accepted by the CFP Board every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – CFP® professionals agree to adhere to the high standards of ethics and practice outlined in CFP Board’s Code of Ethics and Standards of Conduct and to acknowledge CFP Board’s right to enforce them through its Disciplinary Rules and Procedures. The Code of Ethics and Standards of Conduct require that CFP Professionals provide financial planning services in the best interests of their clients.
- Certification Application – Properly complete a Certification Application to (i) acknowledge voluntary adherence to the [terms and conditions of certification with CFP Board](#) and (ii) disclose any involvement in criminal and civil proceedings, inquiries or investigations, bankruptcy filings, internal reviews and customer complaints.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

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### **Disciplinary Information**

None.

### **Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### **Additional Compensation**

Mr. McGill is eligible for bonuses that are based on the number of clients that Mr. McGill introduces to the Registrant as well as the addition of material assets by current clients. Accordingly, Mr. McGill has an incentive to attract new clients and have clients add additional assets to their accounts with the Registrant.

## **Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, Sarah Pazdan, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Ms. Pazdan at (805) 541-1308.

## **Emily Goodman**

Wacker Wealth Partners, LLC

Brochure Supplement

Dated January 1, 2024

Contact: Sarah Pazdan, Chief Compliance Officer

892 Aerovista Place, Suite 220

San Luis Obispo, California 93401

[www.WackerWealthPartners.com](http://www.WackerWealthPartners.com)

**This Brochure Supplement provides information about Emily Goodman that supplements the Wacker Wealth Partners, LLC Brochure; you should have received a copy of that Brochure. Please contact Sarah Pazdan, Chief Compliance Officer, if you did *not* receive Wacker Wealth Partners, LLC's Brochure or if you have any questions about the contents of this supplement.**

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

### **Education Background and Business Experience**

Emily Goodman was born in 1985. Ms. Goodman graduated from New York University in 2007, with a bachelor's degree in Fine Arts. Ms. Goodman has been employed as a Wealth Planning Analyst of Wacker Wealth Partners, LLC since January 2019.

Ms. Goodman has been a CERTIFIED FINANCIAL PLANNER™ since 2022. The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 76,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 6 hours, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Disciplinary Information**

None.

### **Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.

B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### **Additional Compensation**

Ms. Goodman is eligible for bonuses that are based on the number of clients that Ms. Goodman introduces to the Registrant as well as the addition of material assets by current clients. Accordingly, Ms. Goodman has an incentive to attract new clients and have clients add additional assets to their accounts with the Registrant.

### **Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Adviser's Act ("*Act*"). The Registrant's Chief Compliance Officer, Sarah Pazdan, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Ms. Pazdan at (805) 541-1308.

## **Brynne Speizer**

Wacker Wealth Partners, LLC

Brochure Supplement

Dated January 1, 2024

Contact: Sarah Pazdan, Chief Compliance Officer  
892 Aerovista Place, Suite 220  
San Luis Obispo, California 93401  
[www.WackerWealthPartners.com](http://www.WackerWealthPartners.com)

**This Brochure Supplement provides information about Brynne Speizer that supplements the Wacker Wealth Partners, LLC Brochure; you should have received a copy of that Brochure. Please contact Sarah Pazdan, Chief Compliance Officer, if you did *not* receive Wacker Wealth Partners, LLC's Brochure or if you have any questions about the contents of this supplement.**

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

### **Education Background and Business Experience**

Brynne Speizer was born in 1979. Ms. Speizer graduated from Wellesley College in 2001, with a bachelor's degree in American Studies and obtained an master's degree in Social Impact Management from Brandeis University in 2010. Ms. Speizer has been employed as a Wealth Planning Analyst of Wacker Wealth Partners, LLC since February 2018.

Ms. Speizer has been a CERTIFIED FINANCIAL PLANNER™ since 2021. The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct



and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 76,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 6 hours, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Disciplinary Information**

None.

## **Other Business Activities**

A. The supervised person is not actively engaged in any other investment-related businesses or occupations.

B. Ms. Speizer is also employed by California Polytechnic University – San Luis Obispo, as an instructor, and has been since 2023.

## **Additional Compensation**

Ms. Speizer is eligible for bonuses that are based on the number of clients that Ms. Speizer introduces to the Registrant as well as the addition of material assets by current clients. Accordingly, Ms. Speizer has an incentive to attract new clients and have clients add additional assets to their accounts with the Registrant.

## **Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Adviser's Act ("*Act*"). The Registrant's Chief Compliance Officer, Sarah Pazdan, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Ms. Pazdan at (805) 541-1308.

## **Stuart Campbell**

Wacker Wealth Partners, LLC

Brochure Supplement

Dated January 1, 2024

Contact: Sarah Pazdan Chief Compliance Officer

892 Aerovista Place, Suite 220

San Luis Obispo, California 93401

WWW.WackerWealthPartners.com

**This Brochure Supplement provides information about Stuart Campbell that supplements the Wacker Wealth Partners, LLC Brochure; you should have received a copy of that Brochure. Please contact Sarah Pazdan, Chief Compliance Officer, if you did *not* receive Wacker Wealth Partners, LLC's Brochure or if you have any questions about the contents of this supplement.**

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

### **Education Background and Business Experience**

Stuart Campbell was born 1987. Mr. Campbell graduated from California Polytechnic State University in 2011, with a Bachelor of Science in Business Administration with a concentration in Marketing. Mr. Campbell has been employed as a Wealth Planning Analyst of Wacker Wealth Partners, LLC since February 2021. During the year 2020 he worked for New York Life as an agent. From 2014 to 2020, Mr. Campbell was a Senior Community Representative for Shea Homes.

Mr. Campbell has been a CERTIFIED FINANCIAL PLANNER™ since 2022. The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with

clients. Currently, more than 76,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 6 hours, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Disciplinary Information**

None.

## **Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## **Additional Compensation**

Mr. Campbell is eligible for bonuses that are based on the number of clients that Mr. Campbell introduces to the Registrant as well as the addition of material assets by current clients. Accordingly, Mr. Campbell has an incentive to attract new clients and have clients add additional assets to their accounts with the Registrant.

## **Supervision**

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## **Ryan Hall**

Wacker Wealth Partners, LLC

Brochure Supplement

Dated January 1, 2024

Contact: Sarah Pazdan Chief Compliance Officer

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**This Brochure Supplement provides information about Ryan Hall that supplements the Wacker Wealth Partners, LLC Brochure; you should have received a copy of that Brochure. Please contact Sarah Pazdan, Chief Compliance Officer, if you did *not* receive Wacker Wealth Partners, LLC's Brochure or if you have any questions about the contents of this supplement.**

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

### **Education Background and Business Experience**

Ryan Hall was born 1991. Mr. Hall graduated from Duke University in 2012, with a Bachelor of Arts in History with Minors in Theatre Studies and Visual Arts. Mr. Hall has been employed as a Wealth Planning Analyst of Wacker Wealth Partners, LLC since November 2021. From 2019 to 2021, Mr. Hall was the Director of Operations at the TrueNorth Health Center. From 2017 to 2018, Mr. Hall worked in Sales and Business Development for Safe Catch, Inc. From 2015 to 2017, Mr. Hall was the Grounds Supervisor at the Esalen Institute. From 2014 to 2015, Mr. Hall was an Account Executive with Computer Aid, Inc.

Mr. Hall has been a CERTIFIED FINANCIAL PLANNER™ since 2023. The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with

clients. Currently, more than 76,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 6 hours, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Disciplinary Information**

None.

## **Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## **Additional Compensation**

Mr. Hall is eligible for bonuses that are based on the number of clients that Mr. Hall introduces to the Registrant as well as the addition of material assets by current clients. Accordingly, Mr. Hall has an incentive to attract new clients and have clients add additional assets to their accounts with the Registrant.

## **Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Adviser's Act ("*Act*"). The Registrant's Chief Compliance Officer, Sarah Pazdan, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Ms. Pazdan at (805) 541-1308.