

# TIMOTHY S. WHELAN

CORNERSTONE WEALTH PARTNERS, LLC  
2525 JOLLY ROAD, STE 200  
OKEMOS, MI 48864  
(517) 381-3450

FIRM SUPPLEMENTAL BROCHURE  
ADV PART 2B  
March 5, 2024

This Brochure Supplement provides information about Timothy S. Whelan that supplements the Cornerstone Wealth Partners, LLC's brochure. You should have received a copy of that brochure. Please contact Mr. Whelan at (517) 381-3450 if you did not receive Cornerstone Wealth Partners, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Timothy S. Whelan is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. The CRD number for Mr. Whelan's is 7364966.

## Item 2 – Educational Background and Business Experience

**Timothy S. Whelan**

**Born:** 1990

### **Education:**

***Michigan State University*** – Bachelor of Arts in History – 2012

***Certified Exit Planning Advisor, CEPA®*** – 2022

*Issued By:* Exit Planning Institute

*Prerequisites:* Candidates must meet all the following requirements:

- have 5 years of full-time or equivalent working directly with business owners as a financial advisor, attorney, CPA, business broker, investment banker, commercial lender, estate planner, insurance professional, business consultant or in a related capacity;
- have an undergraduate degree from a qualifying institution or additional professional work experience (two years of relevant professional experience may be substituted for each year of required undergraduate studies); and
- be an Exit Planning Institute member in good standing.

*Designation Training Requirements:* Five-day educational program

*Designation Exam Type:* Online, proctored, closed book final exam

*Continuing Education Requirements:* 40 hours every three years

### **Business Background:**

***Cornerstone Wealth Partners, LLC*** – December 2023 to Present  
– Investment Adviser Representative

***Insurance Sales*** – October 2020 to Present  
– Licensed Insurance Agent

***The O.N. Equity Sales Company*** – May 2021 to December 2023  
– Registered Representative/Agent

***MedWise Marketing*** – July 2023 to December 2023  
– Sales Leader

***Churchill Mortgage Corporation*** – March 2016 to October 2020  
– Home Loan Specialist

## Item 3 – Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that could be material to your evaluation of each supervised person providing investment advice. These include the following:

- A. A criminal or civil action in a domestic, foreign or military court of competent jurisdiction in which the *supervised person*

1. was convicted of, or pled guilty or nolo contendere (“no contest”) to (a) any *felony*; (b) a *misdemeanor* that *involved* investments or an *investment-related* business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
2. is the named subject of a pending criminal *proceeding* that involves an *investment-related* business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;
3. was *found* to have been *involved* in a violation of an *investment-related* statute or regulation; or
4. was the subject of any *order*, judgment, or decree permanently or temporarily enjoining, or otherwise limiting, the *supervised person* from engaging in any *investment-related* activity, or from violating any *investment-related* statute, rule, or *order*.

Mr. Whelan has no information applicable to this item.

B. An administrative *proceeding* before the SEC, any other federal regulatory agency, any state regulatory agency, or any *foreign financial regulatory authority* in which the *supervised person*

1. was *found* to have caused an *investment-related* business to lose its authorization to do business; or
2. was *found* to have been *involved* in a violation of an *investment-related* statute or regulation and was the subject of an *order* by the agency or authority
  - i. denying, suspending, or revoking the authorization of the *supervised person* to act in an *investment-related* business;
  - ii. barring or suspending the *supervised person's* association with an *investment-related* business;
  - iii. otherwise significantly limiting the *supervised person's investment-related* activities; or
  - iv. imposing a civil money penalty of more than \$2,500 on the *supervised person*.

Mr. Whelan has no information applicable to this item.

C. A *self-regulatory organization (SRO) proceeding* in which the *supervised person*

1. was *found* to have caused an *investment-related* business to lose its authorization to do business; or
2. was *found* to have been *involved* in a violation of the *SRO's* rules and was: (i) barred or suspended from membership or from association with other members,

or was expelled from membership; (ii) otherwise significantly limited from *investment-related* activities; or (iii) fined more than \$2,500.

Mr. Whelan has no information applicable to this item.

- D. Any other *proceeding* in which a professional attainment, designation, or license of the *supervised person* was revoked or suspended because of a violation of rules relating to professional conduct. If the *supervised person* resigned (or otherwise relinquished his attainment, designation, or license) in anticipation of such a *proceeding* (and the adviser knows, or should have known, of such resignation or relinquishment), disclose the event.

Mr. Whelan has no information applicable to this item.

#### Item 4 – Other Business Activities

Mr. Whelan is a licensed insurance agent. He devotes approximately 15% of his time to this activity and may recommend the sale of insurance products to you. This other business activity pays him commissions that are separate from the fee described in Item 5, of the firm's ADV Part 2A. The commissions give him a financial incentive to recommend and sell insurance products. Mr. Whelan attempts to mitigate any conflicts of interest to the best of his ability by placing your interests ahead of his own and through the implementation of policies and procedures that address the conflict. Additionally, you are informed that you always have the right to choose whether to act on the recommendation and you have the right to purchase recommended insurance products through any licensed insurance agent.

Mr. Whelan owns Stafford Pathways, LLC, where he provides consulting and Business Valuations. Stafford Pathways, LLC also owns a Sports League. He devotes approximately 25% of his time to this non-investment related activity.

#### Item 5 – Additional Compensation

Mr. Whelan does not receive any additional compensation.

#### Item 6 – Supervision

Evan Vanderwey, our President, Chief Executive Officer and Chief Compliance Officer, is responsible for monitoring the advice that Jordan Leaman provides to clients. To carry out his responsibility, periodically, Evan Vanderwey reviews Jordan Leaman's client account information, correspondence, client activity, and promotional material to ensure that recommendations to clients are fair and appropriate given the clients' investment needs. Evan Vanderwey may be reached at (517) 381-3450.

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

##### Arbitration or Civil, Self-Regulatory Organization or Administrative Proceedings

Mr. Whelan has not been the subject of any arbitration, civil, self-regulatory organization or administrative finding.

Bankruptcy History

Mr. Whelan has not been the subject of a bankruptcy petition.