

*This brochure supplement provides information about Kevin Sandieson that supplements the Fortress Planning Group LLC brochure. You should have received a copy of that brochure. Please contact Scott Wellens, Founder & Investment Adviser, if you did not receive Fortress Planning Group LLC's brochure or if you have any questions about the contents of this supplement.*

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

# **Fortress Planning Group LLC**

## **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**Kevin Sandieson**

Personal CRD Number: 7059408

Investment Adviser Representative

Fortress Planning Group, LLC  
N27W23953 Paul Rd, Suite 103  
Pewaukee, WI 53072

(262) 264-5838  
[scott@fortressplanninggroup.com](mailto:scott@fortressplanninggroup.com)

UPDATED: 03/13/2024

## Item 2: Educational Background and Business Experience

**Name:** Kevin Sandieson

**Born:** 1979

### **Educational Background:**

Master of Business Administration (MBA), Kent State University, 2007

Bachelor of Science in Plastics Engineering Technology, Penn State University, 2001

### **Business Experience:**

10/2018 – Present	Financial Advisor & Partner Fortress Planning Group
04/2014 – 09/2018	Sr. Project Manager The Master Lock Company
03/2010 – 03/2014	Sr. Project Manager Moen Inc.

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

## Item 4: Other Business Activities

Kevin Sandieson is **not** actively engaged in any investment-related business or occupation **nor** is he actively engaged in any other business or occupation for compensation.

### Item 5: Additional Compensation

Kevin Sandieson does not receive any economic benefit from someone who is not a client; including sales awards, prizes or bonuses.

### Item 6: Supervision

As a representative of Fortress Planning Group LLC, Kevin Sandieson is supervised by Scott Wellens, the firm's Founder and Lead Financial Advisor. Scott Wellens is responsible for ensuring that Kevin Sandieson adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Written Policies and Procedures Manual and Code of Ethics. The phone number for Scott Wellens (262) 264-5838.

### Item 7: Requirements For State Registered Advisers

A. Kevin Sandieson has NOT been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.

B. Kevin Sandieson has NOT been the subject of a bankruptcy petition in the past ten years.