
**Part 2B of Form
ADV Firm Brochure**

May 7, 2019

Holder Wealth Management, Inc.

2504 Galen Drive, Suite
105
Champaign, IL 61821

phone: 217-398-
4015

website:
www.holderwealthmgt.com

This brochure supplement ("Brochure Supplement") provides information about the Investment Adviser Representatives of Holder Wealth Management, Inc. ("HWM") that supplements the HWM Brochure. You should have received a copy of that Brochure. If you did not receive HWM's Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at dholder@holderwealthmgt.com.

Additional information about HWM's Investment Adviser Representatives is also available on the SEC's website at www.adviserinfo.sec.gov.

Daniel E. Holder

Item 2: Educational Background and Business Experience

Daniel E. Holder (b. 1952) is the Chief Executive Officer of Holder Wealth Management, Inc.

Educational Background:

BS, Northern Arizona University, 1973

JD, Loyola School of Law, New Orleans, 1979

Professional Designations and Licenses:

Certified Financial Planner (CFP)

Licensed Attorney (Illinois)

Certified Public Accountant (CPA)

Business Background:

Montgomery, Barnett, Brown, & Read (Law firm, 1979---1981)

Managing Partner, Clifton Gunderson & Co. (CPA firm, 1981---2001)

Executive Vice President, Strategic Capital Trust Company (2001---2009)

President, Daniel E. Holder & Associates (2001 --- Present)

President, Ruedi Holder & Associates, Inc. (2009---2014)

Chief Executive Officer, Holder Wealth Management, Inc. (2014 --- Present)

Professional Designations --- Qualifications and Related Criteria

Information regarding the qualifications for Mr. Holder's professional designations and licenses may be found at the back of this Brochure Supplement.

Item 3: Disciplinary Information

This item is not applicable.

Item 4: Other Business Activities

Daniel E. Holder is the President and owner of Daniel E. Holder & Associates, Inc., a certified public accounting firm, offering accounting, tax, and business consultation services. Mr. Holder is compensated for his work in the CPA firm. Clients of Daniel E. Holder & Associates, Inc. are free to do business with the investment adviser of their choice.

Additionally, Mr. Holder teaches part-time at the University of Illinois, Urbana---Champaign. Mr. Holder receives compensation from his work as a professor at the University of Illinois. University of Illinois students and faculty are free to do business with the investment adviser of their choice.

Item 5: Additional Compensation

Mr. Holder receives additional compensation through his business activities described in Item 4 above.

Item 6: Supervision

Daniel E. Holder is also the Chief Compliance Officer of HWM. As part of the supervision of the activities of the firm, Mr. Holder reviews internal transactions and security holdings reports, electronic and physical correspondence, and other internal reports as mandated by the firm and its regulatory authorities. Mr. Holder may be reached at 217-398-4015.

Item 7: Requirement for State Registered Advisers

Mr. Holder has not been found liable in an arbitration claim alleging damages in excess of \$2,500.00.

Mr. Holder has not been found liable in a civil, self-regulatory organization, or administrative proceeding.

Charles B. Holder

Item 2: Educational Background and Business Experience

Charles B. Holder (b. 1986) is the President of Holder Wealth Management, Inc.

Educational Background:

BS, University of Virginia, 2008

JD, Washington and Lee University, 2011

Professional Designations and Licenses:

Licensed Attorney (Illinois)

Certified Public Accountant (CPA)

Business Background:

President, Holder Wealth Management (2014 --- Present)

Associate, Daniel E. Holder & Associates (2011 --- Present)

Charles B. Holder, Attorney at Law (2014 --- Present)

Professional Designations --- Qualifications and Related Criteria

Information regarding the qualifications for Mr. Holder's professional designations and licenses may be found at the back of this Brochure Supplement.

Item 3: Disciplinary Information

This item is not applicable.

Item 4: Other Business Activities

Charles B. Holder is an associate of Daniel E. Holder & Associates, Inc., a certified public accounting firm, offering accounting, tax, and business consultation services. Mr. Holder is compensated for his work in the CPA firm. Clients of Daniel E. Holder & Associates, Inc. are free to do business with the investment adviser of their choice.

Mr. Holder also maintains a separate law practice, Charles B. Holder, Attorney at Law, for which he receives separate compensation. Clients of Daniel E. Holder & Associates, Inc. and Charles B. Holder, Attorney at Law, are free to do business with the investment adviser of their choice.

Additionally, Mr. Holder teaches part-time at the University of Illinois, Urbana---Champaign. Mr. Holder receives compensation from his work as a professor at the University of Illinois. University of Illinois students and faculty are free to do business with the investment adviser of their choice.

Item 5: Additional Compensation

Mr. Holder receives additional compensation through his business activities described in Item 4 above.

Item 6: Supervision

Daniel E. Holder is also the Chief Compliance Officer of HWM. As part of the supervision of the activities of the firm, Mr. Holder reviews internal transactions and security holdings reports, electronic and physical correspondence, and other internal reports as mandated by the firm and its regulatory authorities. Mr. Holder may be reached at 217-398-4015.

Item 7: Requirement for State Registered Advisers

Mr. Holder has not been found liable in an arbitration claim alleging damages in excess of \$2,500.00.

Mr. Holder has not been found liable in a civil, self---regulatory organization, or administrative proceeding.

Professional Designations -- Qualifications and Related Criteria

Certified Financial Planner™ (CFP®)

The CERTIFIED FINANCIAL PLANNERTM (CFP®) certification process, administered by CFP Board, identifies that those individuals who have been authorized to use the CFP certification marks in the U.S. have met rigorous professional standards and have agreed to adhere to the principles of integrity, objectivity, competence, fairness, confidentiality, professionalism, and diligence when dealing with clients.

CFP certificants must pass the comprehensive CFP Certification Examination; pass CFP Board's Candidate Fitness Standards; agree to abide by CFP Board's Code of Ethics and Professional Responsibility, which puts clients' interests first; and comply with the Financial Planning Practice Standards, which spell out what clients should be able to reasonably expect from the financial planning engagement. These are just some of the reasons why the CFP certification is becoming increasingly recognized.

To become certified, candidates are required to meet the following initial certification 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 10 hours over a two---day period, 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).

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.

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.

Certified Public Accountant (CPA)

One of the world's leading licensing examinations, the Uniform CPA Examination serves to protect the public interest by helping to ensure that only qualified individuals become licensed as Certified Public Accountants (CPAs). The exam is one of the "Three E's" – education, examination, and experience – that are required for licensure as a CPA. Consequently, passing the examination is not, in itself, sufficient to meet requirements for licensure.

Licensing: The licensing authority and requirements for CPAs falls under the jurisdiction of the Board of Accountancy for the state, district, or country in which a CPA practices. In adherence to the AICPA mission, the Institute seeks the highest possible level of uniform certification and licensing standards while promoting and protecting the CPA designation. The national organization representing the state boards is the National Association of State Boards of Accountancy (NASBA).

Requirements: The requirements, which are set by each state board of accountancy, include:

1. Completing a program of study in accounting at a college or university.
2. Passing the Uniform CPA Exam.
3. Obtaining a specific amount of professional work experience in public accounting (the required amount and type of experience varies according to licensing jurisdiction).

Ethics: Upon joining the AICPA, a member agrees to abide by its Code of Professional Conduct and Bylaws adopted by a vote of the membership. The bylaws provide a structure for enforcement of the Code by the Institute's Professional Ethics Division. When allegations come to the attention of the Ethics Division regarding a violation of the Code, the division investigates the matter, under due process procedures, and, depending upon the facts found in the investigation, may take a confidential disciplinary action, settle the matter with suspension or revocation of membership rights, or refer the matter to a panel of the Trial Board Division for a hearing. The bylaws mandate publishing the member's name if he or she is found guilty by a hearing panel, suspended, or expelled by settlement.

The bylaws of 51 state and/or territorial CPA societies provide for their participation in a Joint Ethics Enforcement Program so that, depending upon membership status, actions taken by one or more of these societies or the AICPA are in the names of both the society and AICPA. State regulatory agencies (Boards of Accountancy) issue practice licenses to CPAs and only those agencies may act to affect those licenses. The AICPA does not license CPAs. Those state regulatory agencies may take disciplinary action affecting practice licenses under statutes, regulations, and rulings of the state. Also, the Securities and Exchange Commission (SEC) and other Federal government agencies may, under Federal law or regulation, discipline CPAs who practice before these agencies.