



FORM ADV PART 2B – BROCHURE SUPPLEMENT

**Heidi L. Bannerman
Curi Wealth Management, LLC**

**700 Spring Forest Road – Suite 235
Raleigh, North Carolina 27609
(919) 890-0515
www.curicapital.com**

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This Brochure Supplement provides information about the Supervised Person, which supplements the Curi Wealth Management, LLC Brochure. You should have received a copy of that Brochure. Please contact the Chief Compliance Officer at (917) 538-7935 if you did not receive Curi Wealth Management, LLC's Brochure or if you have any questions about the content of this supplement.

Item 2: Educational Background and Business Experience

Year of Birth: 1976

Educational Background

Attended Grossmont College (August 1996 – May 1997, August 1998 – May 2000)

Attended University of Arizona (August 1995 – May 1996)

Business Experience

<u>Company</u>	<u>Title</u>	<u>Dates</u>
Curi Wealth Management, LLC	Client Service Associate	June 2019 - Present
SharpVue Capital, LLC	Client Service Associate	May 2018 – June 2019
Morgan Stanley	Senior Client Service Associate	October 2004 – May 2018

Item 3: Disciplinary Information

Curi Wealth Management, LLC (“Curi”) is required to disclose all material facts regarding any legal or disciplinary events that would be material to a client’s evaluation of each Supervised Person providing investment advice.

There is no information to report with respect to this item.

Item 4: Other Business Activities

Curi is required to disclose all investment related business or other occupation in which its Supervised Persons are involved.

There is no information to report with respect to this item.

Item 5: Additional Compensation

Curi is required to disclose any economic benefit a Supervised Person receives, other than from Curi, for providing advisory services.

There is no information to report with respect to this item.

Item 6: Supervision

Heidi L. Bannerman is a Client Service Associate of Curi and is currently supervised by the Mark Paccione, the Chief Investment Officer. All Supervised Persons are subject to Curi’s compliance program which is administered and overseen by the Chief Compliance Officer who can be reached at (917) 538-7935 or Kathleen.keating@curicapital.com.