

**Iris L. Buczkowski**

**Birch Wealth, Inc.  
d/b/a: Birch Wealth Management**

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**October 3, 2019**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Iris L. Buczkowski that supplements the Birch Wealth Management brochure. You should have received a copy of that brochure. Contact us at 315-795-2005 if you did not receive Birch Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Iris L. Buczkowski (CRD # 4582535) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

**Iris L. Buczkowski**

*Year of Birth:* 1979

*Formal Education After High School:*

- State University of New York - Institute of Technology, MBA Technology Management (Accounting & Finance), 2007
- State University of New York - Institute of Technology, BA Finance, 2004

*Business Background:*

- Birch Wealth, Inc. d/b/a Birch Wealth Management, President/Chief Compliance Officer, 5/2019 - Present
- Birch Wealth, Inc. d/b/a Birch Wealth Management, Investment Adviser Representative, 6/2019 - Present
- Strategic Financial Services, Inc., Senior Advisor, 9/2002 - 4/2019
- Cadaret, Grant & Co, Inc., Registered Representative, 3/2006 - 10/2018

## Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Ms. Iris L. Buczkowski has no required disclosures under this item.

## Item 4 Other Business Activities

Iris L. Buczkowski is separately licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for her clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Ms. Buczkowski for insurance related activities. This presents a conflict of interest because Ms. Buczkowski may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Ms. Buczkowski's receipt of additional compensation as a result of her other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Birch Wealth Management's firm brochure for additional disclosures on this topic.

## Item 6 Supervision

As the President/Chief Compliance Officer of Birch Wealth Management, Iris L. Buczkowski supervises the advisory activities of our firm. Iris L. Buczkowski can be reached at 315-795-2005.

## **Item 7 Requirements for State Registered Advisers**

Iris Buczkowski does not have any reportable arbitration claims, has not been found liable in a reportable civil, self-regulatory organization or administrative proceeding, and has not been the subject of a bankruptcy petition.