



**WEALTH MANAGEMENT ADVISORS**  
REGISTERED INVESTMENT ADVISORS

## **WEALTH MANAGEMENT ADVISORS, LLC**

600 Clark Road, 4th Floor  
Tewksbury, MA 01876  
Telephone: (978) 970-3400  
[www.wmallc.com](http://www.wmallc.com)

### **BROCHURE SUPPLEMENT**

**Form ADV, Part 2B**

*for*

### **JEFFREY R. ARON, CFP®**

600 Clark Road, 4th Floor  
Tewksbury, MA 01876  
Telephone: (978) 970-3400

**September 2014**

This Brochure Supplement provides information about Jeffrey R. Aron that supplements the Brochure of Wealth Management Advisors, LLC ("WMA"). You should have received a copy of WMA's Brochure.

Please contact us by email at [sahern@wmallc.com](mailto:sahern@wmallc.com), by telephone at (978) 970-3400, or by mail at the address shown above if you did not receive the Brochure or if you have any questions about the contents of this Supplement.

Additional information about Jeffrey R. Aron is available on the SEC's website, [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

*Sullivan Bille Group is a common marketing name used to reflect the close working relationship between Sullivan Bille P.C, a public accounting firm, and Wealth Management Advisors, LLC, a registered investment adviser. Investment advisory services are provided by Wealth Management Advisors, LLC, and accounting services are provided by Sullivan Bille P.C.*

**Item 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Year of Birth**

1967

**Business Experience**

Wealth Manager <b>Wealth Management Advisors, LLC</b>	2013 to present
Wealth Manager <b>Jeffrey R. Aron, CFP®</b>	2009 to 2013
VP, Director of Financial & Estate Planning <b>North American Management, Co.</b>	2004 to 2009
Senior Consultant <b>Atlantic Planning Group</b>	2001 to 2003
Vice President <b>RINET Company, LLC</b>	1989 to 2000

**Education**

Bentley University  
**Master of Science, Financial Planning** (2010)

Bryant University  
**Bachelor of Science, Accounting** (1989)

**Professional Designations**

**Certified Financial Planner® (CFP®) Certificant**

College for Financial Planning (2000)

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. To attain the right to use the CFP® mark, an individual must: satisfactorily complete an advanced college-level course of study addressing financial planning subject areas the CFP Board has determined necessary for competent and professional delivery of financial planning services, including insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning; pass the CFP certification exam; must complete qualifying work experience; must agree to adhere to the CFP Board's Standards of Professional Conduct; and complete 30 hours of continuing education hours every two years.

**Item 3: DISCIPLINARY INFORMATION**

Mr. Aron does not have any history of disciplinary events.

**Item 4: OTHER BUSINESS ACTIVITIES**

Mr. Aron does not have any other business activities.

**Item 5: ADDITIONAL COMPENSATION**

Mr. Aron is not a party to any arrangement whereby someone who is not a client provides an economic benefit directly to him for providing advisory services to clients. However, Mr. Aron does receive indirect economic benefit from the services and support WMA receives from participation in the Schwab Institutional (SI) program offered by Charles Schwab & Co., Inc. ("Schwab"), and the

Fidelity Institutional Wealth Services Program ("FI") sponsored by Fidelity Brokerage Services LLC (hereinafter, "Fidelity"), as described in Item 12 of the Brochure. Schwab and Fidelity are each registered as broker-dealers and are members of the Financial Industry Regulatory Authority (FINRA) and the Securities Investors Protection Corporation (SIPC). While there is no direct linkage between Mr. Aron's investment advice to clients and these programs, the economic benefits would likely not be received if he did not recommend these programs. By receiving services and other support from Schwab and Fidelity, WMA does not have to produce or pay the costs of acquiring these services from other sources, thereby contributing to the firm's overall profitability. Consequently, a conflict exists between the interest of WMA (and, indirectly, Mr. Aron) in continuing to receive such services and support, and the interests of clients in seeking the lowest cost for custodial and brokerage services.

**Item 6: SUPERVISION**

Name, Title, and Telephone of Supervisor: Stephen P. Ahern, President (978) 970-3400

The services rendered by Mr. Aron are reviewed semiannually by Mr. Ahern for performance and compliance with firm policies.