

*This brochure supplement provides information about Kelly Marie Murphy that supplements the Cassidy Schiller Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Kelly Marie Murphy if you did not receive Cassidy Schiller Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.*

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

# **Cassady Schiller Wealth Management, LLC**

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

*for*

### **Kelly Marie Murphy**

Personal CRD Number: 4246938

Investment Adviser Representative

Cassady Schiller Wealth Management, LLC  
4555 LAKE FOREST DRIVE, SUITE 400  
CINCINNATI, OH 45242  
(513) 483-6652  
[kmurphy@cassadyschillerwealth.com](mailto:kmurphy@cassadyschillerwealth.com)

UPDATED: 04/21/2017

## Item 2: Educational Background and Business Experience

**Name:** Kelly Marie Murphy **Born:** 1977

### **Educational Background and Professional Designations:**

#### **Education:**

Business Administration Business, University of Cincinnati – 2010

#### **Designations:**

##### **Registered Paraplanner SM or RP®**

Individuals who hold the RP® designation have completed a course of study encompassing the financial planning process, the five disciplines of financial planning and general financial planning concepts, terminology and product categories. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations.

All designees have agreed to adhere to [Standards of Professional Conduct](#) and are subject to a disciplinary process.

Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

#### **Business Background:**

02/2005 - Present	Investment Adviser Representative Cassady Schiller Wealth Management, LLC
10/2009 - Present	Group Fitness Instructor Fitworks
08/2004 - 02/2005	Shareholder Representative Integrated Fund Services

## 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**

Kelly Marie Murphy is not engaged in any investment-related business or occupation (other than this advisory firm).

#### **Item 5: Additional Compensation**

Kelly Marie Murphy does not receive any economic benefit from any person, company, or organization, other than Cassady Schiller Wealth Management, LLC in exchange for providing clients advisory services through Cassady Schiller Wealth Management, LLC.

#### **Item 6: Supervision**

As a representative of Cassady Schiller Wealth Management, LLC, Kelly Marie Murphy is supervised by Michael W Clark, the firm's Chief Compliance officer. Michael W Clark is responsible for ensuring that Kelly Marie Murphy 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 Code of Ethics and compliance manual. The phone number for Michael Clark is (513) 483-6655.

## Item 7: Requirements For State Registered Advisers

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

A. Kelly Marie Murphy 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. Kelly Marie Murphy has NOT been the subject of a bankruptcy petition in the past ten years.