

Brochure Supplement

Kimberly L. Curtis

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This brochure supplement provides information about Kimberly L. Curtis that supplements the brochure of Wealth Legacy Institute, Inc. (hereinafter "WLI"), a copy of which you should have received. Please contact our Chief Compliance Officer if you did not receive Wealth Legacy Institute, Inc.'s brochure or if you have any questions about the contents of this supplement. Additional information about Kimberly L. Curtis is available on the SEC's website at www.adviserinfo.sec.gov.

Wealth Legacy Institute, Inc., a Registered Investment Adviser

950 South Cherry Street, Suite 505, Denver, Colorado 80246 | (303) 753-7578 | www.wealthlegacyinstitute.com

Item 2. Educational Background and Business Experience

Born 1961

Post-Secondary Education:

American College – 2004, M.S.F.S.

University of Denver College of Law – 1984, M.S.J.A.

Elmira College – 1983, B.S., Court Administration

Recent Business Background:

Wealth Legacy Institute, Inc., President & Chief Executive Officer, 08/2007 – Present

American Express Financial Advisors, Senior Financial Advisor, 1992 – 08/2007

Professional Designations:

Kimberly L. Curtis holds the following designations: CERTIFIED FINANCIAL PLANNER™ (“CFP®”), Chartered Financial Consultant (“ChFC®”), Chartered Life Underwriter (“CLU®”), Certified Advisor in Philanthropy® (“CAP®”), and Accredited Estate Planner® (“AEP®”).

The CFP®, CERTIFIED FINANCIAL PLANNER™ and certification marks are financial planning credentials awarded by Certified Financial Planner Board of Standards Inc. (“CFP Board”) to individuals who meet its education, examination, work experience, and ethics requirements. Eligible candidates must have at least a bachelor's degree (or its equivalent) in any discipline from an accredited college or university in order to obtain a CFP® certification. The candidate also must pass an examination, have three years of personal financial planning experience, and meet the CFP Board's ethical requirements. To maintain the certification, the CFP Board requires individuals to complete 30 hours of continuing education hours every two years and renew an agreement to be bound by its Standards of Professional Conduct.

The ChFC® designation is a financial planning credential awarded by the American College to individuals who satisfy its educational, work experience and ethics requirements. Recipients of the ChFC® certification have completed at least seven mandatory college-level courses in the areas of financial, insurance, retirement and/or estate planning, as well as income taxation and/or investments. Additionally, recipients have completed at least two elective courses on the financial system, estate planning applications, executive compensation, and/or retirement decisions. In order to maintain the designation, ChFC® holders must satisfy the ongoing requirements of the Professional Achievement in Continuing Education (“PACE”) Recertification Program, which includes 30 hours of continuing education at least every two years.

The CLU® designation is an insurance credential awarded by the American College to individuals who meet its educational, work experience and ethical requirements. Recipients of the CLU® designation

have completed five required college-level core courses and three electives, covering all aspects of insurance planning, estate and retirement issues, taxation, business insurance and risk management. Recipients are further required to have three years of full-time business experience and must adhere to the American College Code of Ethics and Procedures. In order to maintain the designation, CLU® holders must satisfy the ongoing requirements of the PACE Recertification Program, which includes 30 hours of continuing education at least every two years.

The CAP® designation is a philanthropic related credential awarded by the American College to individuals who meet its educational, work experience and ethical requirements. Recipients of the CAP® certification have completed at least three mandatory graduate-level courses addressing gift planning in the context of family wealth, gift planning in a non-profit context, and charitable strategies. Recipients are further required to have at least three years experience as a non-profit employee or in a capacity advising individuals or charitable organizations in the areas of wealth and estate planning, financial planning, charitable planning, planned giving, nonprofit or foundation services, and other similarly related philanthropic ventures. In order to maintain the designation, CAP® holders must satisfy the ongoing requirements of the PACE Recertification Program, while includes 15 hours of continuing education at least every two years.

The AEP® designation is an estate planning credential awarded by the National Association of Estate Planners & Councils to individuals who meet its professional, educational, experience and ethics requirements. All recipients of the AEP® designation are required to be attorneys possessing a Juris Doctorate, Certified Public Accountants, or holders of a qualifying insurance, financial planning or trust officer designation (CLU®, ChFC®, CFP® or CTFA®). Recipients must be in good standing with their respective professional organizations and have at least five years experience in estate planning in one or more of the prerequisite professions. AEP® holders have also completed at least two graduate-level courses as part of a masters or doctoral degree or have in excess of 15 years experience as an estate planner. In order to maintain the designation, AEP® designees must further satisfy the ongoing educational requirements, which mandate 30 hours of continuing education at least two years with at least 15 hours devoted specifically to estate planning matters.

For additional information about the designations discussed above, please refer directly to the website of the organization that issues the designation.

Item 3. Disciplinary Information

WLI is required to disclose the facts of any legal or disciplinary events that are material to a client's evaluation of Kimberly L. Curtis. WLI does not have any required disclosures to this Item.

Item 4. Other Business Activities

WLI is required to disclose if Kimberly L. Curtis is engaged in any investment-related business or occupation, including whether the relationship creates a material conflict of interest or if Kimberly L. Curtis receives compensation from the sale of securities products. WLI is also required to disclose if Kimberly L. Curtis is actively engaged in any other business that provides a substantial source of Kimberly L. Curtis's income or involves a substantial amount of her time.

Insurance Commission

Kimberly L. Curtis is also a licensed insurance agent with various insurance companies, and in such capacity, may recommend, on a fully-disclosed commission basis, the purchase of certain insurance products. A conflict of interest exists to the extent that WLI recommends the purchase of insurance products where Kimberly L. Curtis receives insurance commissions or other additional compensation.

Item 5. Additional Compensation

WLI is required to disclose if Kimberly L. Curtis receives an economic benefit outside of her regular compensation (i.e., salary plus regular bonus) for providing advisory services (e.g. additional bonus for referrals). WLI has no disclosures related to this Item.

Item 6. Supervision

Kimberly L. Curtis is the President and Chief Executive Officer of WLI and is generally responsible for her own supervision. Kimberly L. Curtis monitors her advice in an effort to ensure that clients' investments are suitable for her individual clients and consistent with their individual needs, goals, objectives and risk tolerance, as well as any restrictions requested by the firm's clients.

Item 7. Requirements for State-Registered Advisers

WLI is required to disclose if Kimberly L. Curtis has been involved in certain disciplinary events or has been the subject of a bankruptcy petition. WLI has no disclosures pursuant to this Item.