

BRAEBURN WEALTH MANAGEMENT, LLC

FORM ADV PART 2B INDIVIDUAL DISCLOSURE BROCHURE

for

MICHAEL A. POLAND, CFA[®]

This brochure provides information about Michael Poland, CFA[®] and supplements Braeburn Wealth Management's ADV 2A Brochure.

Please contact Braeburn Wealth Management if you did not receive Braeburn Wealth Management's Form ADV 2A Brochure or if you have any questions about the contents of this supplement.

Additional information about Braeburn Wealth Management, LLC and Mr. Poland is also available on the SEC's Adviser search website at www.adviserinfo.sec.gov.

Braeburn Wealth Management's SEC number is: 801-72648
Michael Poland's CRD number is: 1953230

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EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

MICHAEL A. POLAND, CFA®
MANAGING MEMBER AND CHIEF COMPLIANCE OFFICER
Year of Birth: 1961

Post Secondary Education:

B.S., Engineering 1984
Michigan State University, East Lansing, MI

M.B.A., Finance 1990
University of St. Thomas, St. Paul, MN

Examinations/Professional Designations:

CFA Institute: Certified Financial Analyst™ (CFA®)
FINRA: Series 7 (1989) and Series 63 (1989) - *Inactive: Adviser is fee-based*
NASAA: Series 65 (2003)
State of Michigan: Insurance Licensed

Business:

Braeburn Wealth Management, LLC, Norton Shores, MI
Managing Member, Chief Compliance Officer
Registered Investment Adviser 8/2011 - Present

Rehmann Capital Advisory Group, Inc. dba "*Rehmann Financial*", Lansing, MI
Advisory Representative
Registered Investment Adviser 1/2009 – 8/2011

Rehmann Insurance Group, Inc., Muskegon, MI
Insurance and Annuities Representative
Insurance Agency 1/2009 – 8/2011

Royal Alliance & Associates, Inc., New York, NY
Registered Representative
Broker/Dealer 2/2010 – 8/2011

Triad Advisors, Inc., Norcross, GA
Advisory Representative
Registered Investment Adviser 1/2009 – 2/2010

Merrill Lynch, Pierce, Fenner & Smith, Inc., Muskegon, MI (local office)
Registered Representative
Broker/Dealer 6/2000 – 1/2009

(Continued)

Paine Webber, Inc., Weehawken, NJ
Registered Representative
Broker/Dealer 1/1990 – 7/2000

Smith, Barney, Harris Upham & Co., Inc., New York, NY
Registered Representative
Broker/Dealer 7/1989 – 1/1990

Disciplinary Information

Michael Poland has no record of involvement in any legal, disciplinary or negative financial events. Mr. Poland's registration records contain no information that would impact a client's or prospective client's evaluation of him or the integrity of his practice.

Michael Poland has not been involved in any issues involving criminal or civil actions; administrative proceedings before the SEC or any other federal, state or foreign regulatory authorities. Mr. Poland has never had a license suspended or revoked.

Mr. Poland has not been involved in any self-regulatory organization proceedings and has not been the subject of or party to bankruptcy proceedings.

Disclosure background on representatives can be located via the *on the SEC's website* at www.adviserinfo.sec.gov.

Other Business Activities

Braeburn Wealth Management is *solely* engaged in the delivery of financial and investment advisory services. Michael Poland, the Managing Member and Chief Compliance Officer of Braeburn Wealth Management, is otherwise engaged as an independently licensed insurance representative. The time spent engaged in this outside business activity may vary throughout the year but will generally involve up to 2% of Mr. Poland's time.

Additional Compensation

Other than salary, Michael Poland does not receive any economic benefit from any person, company or organization, either directly or indirectly, in exchange for providing clients with advisory services through Braeburn Wealth Management.

As noted above, Michael Poland is an independently licensed insurance representative. Clients of the Braeburn Wealth Management are welcome but are never obligated to purchase annuity or insurance products from Mr. Poland or utilize any product or service that may be recommended.

Clients are welcome to utilize any service provider(s) of their choice and can implement recommendations (if any), in whole or in part, at their discretion. Should clients purchase annuity or insurance products through Michael Poland, he earns normal

commissions paid by insurance companies.

Supervision

As Managing Member, Chief Compliance Officer and sole owner of Braeburn Wealth Management, Michael Poland maintains a vested interest in the firm's compliance and risk management program. As Chief Compliance Officer, Mr. Poland supervises the day-to-day activities of the Adviser and its personnel.

The Adviser takes the issue of compliance and risk management seriously. The Advisor's supervisory system establishes clear lines of authority, accountability and responsibility. Clients are welcome to contact the Chief Compliance Officer with questions or concerns in connection with staff monitoring or the Adviser's internal compliance program. Mr. Poland's contact information is on the front page of this Brochure.

Additional Information

Braeburn Wealth Management has never been the subject of an arbitration claim and has never been involved in any civil or criminal proceedings. The Adviser has never had its registration suspended or revoked.

As previously disclosed Michael Poland has not been party to or the subject of a bankruptcy. Braeburn Wealth Management has not been party to or the subject of a bankruptcy and has not been involved in any civil, regulatory or self-regulatory complaints.

INFORMATION ABOUT THE CFA® DESIGNATION

The Chartered Financial Analyst (CFA®) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute — the largest global association of investment professionals. There are currently more than 90,000 CFA charterholders working in 134 countries.

To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

Global Recognition

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders—often making the charter a prerequisite for employment. Additionally, regulatory bodies in 22 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

Comprehensive and Current Knowledge

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession. To learn more about the CFA charter, visit www.cfainstitute.org.