

*This brochure supplement provides information about Shane Wissmann that supplements the APFS Wealth Management, Inc. brochure. You should have received a copy of that brochure. Please contact Shane Wissmann if you did not receive APFS Wealth Management, Inc.'s brochure or if you have any questions about the contents of this supplement.*

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

## **APFS Wealth Management, Inc.**

Form ADV Part 2B – Individual Disclosure Brochure

*for*

### **Shane Wissmann**

Personal CRD Number: 5667984

Investment Adviser Representative

APFS Wealth Management, Inc.  
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UPDATED: 01/02/2015

## Item 2: Educational Background and Business Experience

**Name:** Shane Wissmann

**Born:** 1986

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

#### **Education:**

Bachelor of Science Finance, Economics, Wayne State College - 2009

#### **Business Background:**

|                   |  |
|-------------------|--|
| 12/2014 - Present | Investment Advisor Representative<br>APFS Wealth Management, Inc.                      |
| 05/2010 - Present | Registered Representative<br>American Portfolios Financial Services, Inc.              |
| 05/2009 - Present | Investment Officer<br>Five Points Bank   |
| 07/2011 - 12/2014 | Investment Advisor Representative<br>Regal Investment Advisors, LLC.                   |
| 07/2009 - 05/2009 | Registered Representative,<br>Investment Advisor Representative<br>SagePoint Financial |
| 08/2006 - 05/2009 | Part-Time Teller<br>First National Bank of Wayne                                       |
| 8/2005 - 5/2009   | Student<br>Wayne State College   |

## 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**

Shane Wissmann is a registered representative of American Portfolios Financial Services, Inc., and an insurance agent of Five Points Insurance Agency. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. APFS Wealth Management, Inc. always acts in the best interest of the client, including in the sale of commissionable products to advisory clients.

Shane Wissmann is also an Investment Officer at Five Points Bank, as well as a Portfolio Manager on the Asset Selection Committee.

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

Shane Wissmann does not receive any economic benefit from any person, company, or organization, other than APFS Wealth Management, Inc. in exchange for providing clients advisory services through APFS Wealth Management, Inc..

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

As a representative of APFS Wealth Management, Inc., Shane Wissmann works closely with supervisor Richard Van Zyl, and all advice provided to clients is reviewed by this supervisor prior to implementation. Richard Van Zyl can be reached at (308) 389-8770. Shane Wissmann adheres to all required regulations regarding the activities of an Investment Adviser Representative, and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics and appropriate securities regulatory requirements.