

*This brochure supplement provides information about Anthony Lee Simonetti that supplements the APFS Wealth Management, Inc. brochure. You should have received a copy of that brochure. Please contact Anthony Lee Simonetti 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 Anthony Lee Simonetti 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*

### **Anthony Lee Simonetti**

Personal CRD Number: 5592155

Investment Adviser Representative

APFS Wealth Management, Inc.  
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## Item 2: Educational Background and Business Experience

**Name:** Anthony Lee Simonetti

**Born:** 1986

**Education:**

Bachelors of Science Finance, Providence College - 2008

**Business Background:**

02/2015 - Present	Investment Adviser Representative APFS Wealth Management, Inc.
11/2014 - Present	Investment Advisor Representative American Portfolios Advisors, Inc.
10/2014 - Present	Registered Representative American Portfolios Financial Services, Inc.
09/2008 - 10/2014	Registered Representative AXA Advisors, LLC
06/2008 - 09/2008	Bartender Midvale Country Club
08/2004 - 05/2008	Student Providence College
06/2002 - 08/2007	Labor A.D. Simonetti Properties

## 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**

Anthony Lee Simonetti is a registered representative with American Portfolios Financial Services, Inc., an Investment Advisor Representative with American Portfolios Advisors, Inc., and a licensed insurance agent.

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. Clients are in no way required to utilize the services any representative of APFS Wealth Management, Inc. in such individual's outside capacity.

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

Anthony Lee Simonetti 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., Anthony Lee Simonetti works closely with supervisor Thomas K. Queri, and all advice provided to clients is reviewed by this supervisor prior to implementation. Thomas Queri can be reached at (585) 641-7905. Anthony Lee Simonetti adheres to all required regulations regarding the activities of an Investment Advisor 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.