

This brochure supplement provides information about Ann Coffey Bean that supplements the Ann T. Coffey Wealth Management LLC d/b/a Coffey Private Wealth Management brochure. You should have received a copy of that brochure. Please contact Ann T. Coffey, Managing Member if you did not receive Ann T. Coffey Wealth Management LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Ann Coffey Bean is also available on the SEC's website at www.adviserinfo.sec.gov.

**Ann T. Coffey Wealth Management LLC
d/b/a Coffey Private Wealth Management**
Form ADV Part 2B – Individual Disclosure Brochure

for

Ann Coffey Bean

Personal CRD Number: 2225708

Investment Adviser Representative

Coffey Private Wealth Management
9821 Katy Freeway, Suite 170
Houston, Texas, 77024
(713) 333-8900
ann@coffeyprivatewealth.com

UPDATED: 10/26/2018

Item 2: Educational Background and Business Experience

Name: Ann Coffey Bean **Born:** 1969

Education:

BA History and Classics, Newcomb College, Tulane University – 1991

Business Background:

12/2011 – Present Managing Member
Coffey Private Wealth Management

09/2006 – 12/2011 Senior Investment Strategist
BBVA Compass Wealth Management Group

10/1995 – 05/2006 Senior Financial Consultant/Private Client Manager
Wells Fargo Private Client 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

Ann Coffey Bean is also an insurance agent and the owner of Ann T. Coffey Investments, LLC. From time to time she may offer clients advice or transaction - oriented products (such as annuities or life insurance products) through that company. Clients should be aware that these services may pay a commission or other compensation and could involve a conflict of interest in that commissionable products conflict with the fiduciary duties of a registered investment advisor. CPWM 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 implement any investment or plan through any representative of CPWM in their capacity as an insurance agent.

Item 5: Additional Compensation

Other than salary, annual bonuses, or regular bonuses, Ann Coffey Bean does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Coffey Private Wealth Management.

Item 6: Supervision

As the only owner and representative of Coffey Private Wealth Management, Ann Coffey Bean supervises all duties and activities of the firm. Ann Coffey Bean's contact information is on the cover page of this disclosure document. Ann Coffey Bean 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.