

# **Form ADV Part 2B – Individual Disclosure Brochure**

**for**

**Matthew McDonald  
Vice President**

**March 28, 2017**

This Brochure Supplement provides information about the background and qualifications of Matthew McDonald in addition to the information contained in the AJ Wealth Strategies, LLC (“AJ Wealth” or the “Advisor”) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you any questions about the contents of the AJ Wealth Disclosure Brochure or this Brochure Supplement, please contact us at (212) 729-7750 or by email at [info@ajwealthllc.com](mailto:info@ajwealthllc.com).

Additional information about Matthew McDonald is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 – Educational Background and Business Experience**

Matthew McDonald is a Vice President of AJ Wealth Strategies, LLC. Mr. McDonald, born in 1985, is dedicated to serving the Clients of AJ Wealth Strategies, LLC. Mr. McDonald earned a B.S.B.A. in Finance from John Carroll University, University Heights, Ohio, in 2008. Additional information regarding Mr. McDonald's employment history is included below.

### **Employment History:**

Vice President, AJ Wealth Strategies, LLC	01/2014 to Present
Financial Analyst, AJ Wealth Strategies, LLC	10/2012 to 12/2013
Sales Associate, State Farm Insurance	03/2012 to 09/2012
Associate, Paragon Advisers	06/2008 to 01/2012

## **Item 3 – Disciplinary Information**

Matthew McDonald, as a registered investment adviser of AJ Wealth Strategies, LLC, is required to disclose all material facts regarding any legal or disciplinary event that would be material to your evaluation of him. Mr. McDonald has no applicable legal or disciplinary events required to be disclosed under this Item.

## **Item 4 – Other Business Activities**

Mr. McDonald has no other business related activities outside of his activities at AJ Wealth Strategies, LLC.

## **Item 5 – Additional Compensation**

Outside of his ordinary compensation earned from his position with AJ Wealth Strategies, LLC, Mr. McDonald does not receive any additional compensation from any other source.

## **Item 6 – Supervision**

Mr. McDonald serves as a Vice President of AJ Wealth and is supervised by Andrew Cooper, Managing Partner, and Justyn Volesko, Managing Partner and Chief Compliance Officer. Mr. Cooper and Mr. Volesko can be reached at (212) 729-7750 if you have any questions about Matthew McDonald's brochure supplement..

## **Item 7 – Requirements for State-Registered Advisers**

Mr. McDonald has never been found liable in any arbitration claim involving an investment or an investment-related business or activity, fraud, false statement(s), or omissions, theft, embezzlement, bribery, forgery, counterfeiting, extortion, or any dishonest, unfair, or unethical practice. Mr. McDonald has never been found liable in a civil, self-regulatory organization, or administrative proceeding involving any investment or an investment-related business or activity, fraud, false statement(s), or omissions, theft, embezzlement, bribery, forgery, counterfeiting, extortion, or any dishonest, unfair, or unethical practice. Mr. McDonald has never been the subject of a bankruptcy petition.