

**Form ADV Part 2B: Brochure Supplement**  
**Item 1: Cover Page**  
**April 2014**

**J. Charles Mann**

**Trinity Wealth Management, LLC**  
**1000 Westlakes Dr. – Suite 275**  
**Berwyn, PA 19312**  
**[www.trinity-wealth.com](http://www.trinity-wealth.com)**

This brochure supplement provides information about Mr. Mann that supplements our brochure. You should have received a copy of that brochure. Please contact J. Charles Man, Chief Compliance Officer if you did not receive Trinity Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

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

## Item 2: Educational Background & Business Experience

**J. Charles Mann**

**Year of Birth:** 1962

### **Educational Background:**

- 1984; University of Tennessee; BA English Literature

### **Business Background:**

- 08/2007 – Present Trinity Wealth Management, LLC; Managing Member and Investment Adviser Representative since 01/2014
- 07/2012 – 01/2014 Private Advisor Group, LLC; Financial Advisor
- 10/2005 – 01/2014 LPL Financial; Financial Advisor and Registered Representative
- 06/2002 – 09/2005 Merrill Lynch, Pierce, Fenner & Smith Incorporated; Financial Advisor

### **Exams, Licenses & Other Professional Designations:**

- 03/2010 – Chartered Retirement Planning Counselor <sup>SM</sup>
- 08/2007 – Series 24
- 06/2000 – Series 7
- 08/2000 – Series 66
- 07/2000 – Pennsylvania Life and Health Insurance License

### **CRPC - Chartered Retirement Planning Counselor:**

Mr. Mann has a professional designation, Chartered Retirement Planning Counselor (CRPC). The CRPC is offered by The College for Financial Planning®. The CRPC Program focuses on the pre- and post-retirement needs of individuals. Enrollment in the program guides you through the retirement process, addressing issues such as estate planning and asset management. The College for Financial Planning® awards the Chartered Retirement Planning Counselor <sup>SM</sup> and CRPC® designation to students who: successfully complete the program; pass the final examination; and comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct promulgated by The College for Financial Planning®.

Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are required to be disclosed.

Successful students receive a certificate and are granted the right to use the designation on correspondence and business cards for a two-year period.

Continued use of the CRPC® designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the CRPC® designation by: completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct.

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to your evaluation of Mr. Mann.

### **Item 4: Other Business Activities**

Mr. Mann is a licensed insurance agent. He may offer insurance products and receive normal and customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation he and/or our supervised persons may earn and may not necessarily be in the best interests of the client.

J. Charles Mann owns and operates Trinity Financial Education, which conducts informational seminars to educate the public on key retirement issues.

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

Mr. Mann does not receive any additional compensation or economic benefit outside of his regular salary such as any sales awards or other prizes.

### **Item 6: Supervision**

Mr. Mann is the sole principal and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.

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

Mr. Mann has not been involved in any arbitration claim alleging any damages. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.