

Item 1 – Cover Page

Venturi Wealth Management
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United States
512-696-1439
<https://www.venturiwealthmanagement.com/>

Brochure Supplement – Richard Michael “Mike” Banks

July 15, 2016

This brochure supplement provides information about Mike Banks that supplements Venturi Wealth Management’s brochure. You should have received a copy of that brochure. Please contact Taylor Kirk at 512-696-1439 if you did not receive Venturi Wealth Management’s brochure or if you have any questions about the contents of this supplement.

Additional information about Mike Banks is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Full Legal Name: Richard Michael Banks

Year of Birth: 1965

Education

B.S. Mechanical Engineering
Texas A&M University, College Station Texas

1987

M.B.A. Business Management
University of Texas, Austin Texas

1992

Designations

Chartered Financial Analyst (CFA®)
CFA Institute

1999

Chartered Financial Analyst (CFA®)

The Chartered Financial Analyst (CFA®) certification is a globally recognized, graduate-level investment credential, recognized for its foundation in investment analysis and portfolio management skills, and emphasizes the highest ethical and professional standards. To attain the right to use the CFA® marks, an individual must satisfactorily fulfill the following requirements:

Prerequisites/Experience: Complete either an undergraduate degree and four years of professional experience involving investment decision-making, or four years of qualified work experience (full time, but not necessarily investment related).

Educational Requirements: Complete a self-study program (250 hours of study for each of the three levels).

Examination Type: Pass the comprehensive CFA® Certification Examination. The examination consists of three comprehensive exams which are six hours in length each.

Ethics: Agree to be bound by CFA Institute's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFA® professionals.

CFA® professionals who fail to comply with the above standards and requirements may be subject to CFA Institute's enforcement process, which could result in suspension or permanent revocation of their CFA® certification.

Business History

Jun 2016 to Present	Chief Financial and Operating Officer at Venturi Wealth Management
Jun 2014 to Jun 2016	Executive Advisor at Consero Global, Inc.
Jun 2013 to Jun 2014	Chief Financial Officer at One Live Media
May 2006 to Jun 2013	Managing Member and CEO at Toliman Advisors, LLC

Item 3 - Disciplinary Information

Neither Venturi Wealth Management nor Mike Banks has any disciplinary history to disclose.

Item 4 - Other Business Activities

Mike Banks has no outside business activities and/or affiliations to disclose.

Item 5 - Additional Compensation

Mike Banks does not receive any other compensation.

Item 6 - Supervision

Mike Banks is supervised by the CCO, Rob Rinner. Please contact him at (512) 220-2035 with questions regarding supervision.