

*This brochure supplement provides information about Joseph A. Anderson that supplements the SHP Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Joseph A. Anderson if you did not receive SHP Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Joseph A. Anderson is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **SHP Wealth Management, LLC**

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

*for*

### **Joseph A. Anderson**

Personal CRD Number: 6353257

Investment Adviser Representative

SHP Wealth Management, LLC  
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UPDATED: 10/22/2018

## Item 2: Educational Background and Business Experience

**Name:** Joseph A. Anderson **Born:** 1991

### **Educational Background and Professional Designations:**

#### **Education:**

BA Economics, University Of Massachusetts Amherst - 2014

#### **Business Background:**

11/2015 - Present	Investment Adviser Representative SHP Wealth Management, LLC
07/2015 – 11/2015	Registered Representative MML Investors Services
05/2015 – 11/2015	Agent Mass Mutual Life Insurance Company
06/2015 - 11/2015	Financial Consultant Commonwealth Financial Group
08/2014 – 05/2015	Mutual Fund Service Representative Eaton Vance Distributors, Inc.
06/2014 - 05/2015	Mutual Fund Service Representative Eaton Vance Investment Managers
05/2013 – 01/2014	Investment Consultant Intern Sentinel Benefits & Financial Group

## 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**

Joseph A. Anderson is an independent licensed insurance agent, and from time to time, will offer clients advice or products from those activities. Clients should be aware that these services pay a commission or other compensation and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. SWML always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services of any representative of SWML in connection with such individual's activities outside of SWML.

Joseph A. Anderson engages in a relationship with attorney Keith McManus of McManus Estate Planning. They share insurance commissions on mutual clients.

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

Joseph A. Anderson does not receive any economic benefit from any person, company, or organization, other than SHP Wealth Management, LLC in exchange for providing clients advisory services through SHP Wealth Management, LLC.

#### **Item 6: Supervision**

As a representative of SHP Wealth Management, LLC, Joseph A. Anderson is supervised by Matthew C. Peck, CFP® the firm's Chief Compliance officer. Matthew C. Peck, CFP® is responsible for ensuring that Joseph A. Anderson adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Matthew C. Peck, CFP® is (508) 746-2400.