



**22260 Haggerty Road, Suite 160
Northville, MI 48167**

Part 2B of Form ADV: Brochure Supplement for

Carmela E. Eastin



**331 Alcove Road, Suite 300
Mooresville, NC 28117**

This brochure supplement provides information about Carmela Eastin that supplements our firm brochure. You should have received a copy of that brochure. Please contact Dewey Steffen, Chief Executive Officer, if you did not receive the disclosure of Great Lakes Wealth, LLC and its dba LangTree Wealth or if you have any questions about the contents of this supplement. Additional information about Carmela Eastin is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

Carmela E. Eastin
Year of Birth: 1956

Educational Background:

- 1981: Attended Central Michigan University

Business Background:

- 07/2016 – Present Great Lakes Wealth, LLC; Director of Operations & Investment Adviser Representative & Chief Compliance Officer
- 07/2016 – Present Purshe Kaplan Sterling Investments, Inc; Registered Non-Representative
- 09/1993 – 07/2016 UBS Financial Services, Inc.; Sr. Registered Client Service Associate

Exams, Licenses & Other Professional Designations:

- 10/1997: Series 65 Exam
- 06/1994: Series 8 Exam
- 01/1993: Series 63 Exam
- 11/1991: Series 7 Exam

Item 3: Disciplinary Information

There are no legal or disciplinary events material to the evaluation of Carmela Eastin.

Item 4: Other Business Activities

Carmela Eastin is a licensed insurance agent. She may offer insurance products but does not receive customary fees as a result of insurance sales.

Item 5: Additional Compensation

Carmela Eastin does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Dewey Steffen, Chief Executive Officer of Great Lakes Wealth, LLC, supervises and monitors Carmela Eastin's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Steffen if you have any questions about Carmela Eastin's brochure supplement at (248) 378-1200.

Item 7: Requirements for State-Registered Advisers

Carmela Eastin has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, she 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.



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Part 2B of Form ADV: Brochure Supplement for

Dewey D. Steffen



**331 Alcove Road, Suite 300
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Date: October 2017

Item 2: Educational Background & Business Experience

Dewey D. Steffen

Year of Birth: 1971

Educational Background:

- 1995: University of Michigan; Bachelor of Arts in Economics
- 1992: Schoolcraft College; Associate of Arts in Business Administration

Business Background:

- 07/2016 – Present Great Lakes Wealth, LLC; Chief Executive Officer & Investment Adviser Representative
- 07/2016 – Present Purshe Kaplan Sterling Investments, Inc; Registered Representative
- 02/2007 – 07/2016 UBS Financial Services, Inc.; First Vice President & Portfolio Manager
- 03/2001 – 02/2007 Citigroup Smith Barney, Inc.; First Vice President & Retirement Planning Specialist
- 03/1997 – 03/2001 Comerica Securities; Vice President & Senior Investment Consultant

Exams, Licenses & Other Professional Designations:

- 11/2010: Series 65 Exam
- 11/1997: MI Insurance Licensure
- 04/1996: Series 7 Exam
- 12/1995: Series 52 & 63 Exams

Item 3: Disciplinary Information

There are no legal or disciplinary events material to the evaluation of Dewey D. Steffen.

Item 4: Other Business Activities

Dewey D. Steffen 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.

Dewey D. Steffen is a registered representative of Purshe Kaplan Sterling Investments, Inc, member FINRA/SIPC. He may offer securities and receive normal and customary commissions as a result of securities transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation Dewey Steffen may earn.

Dewey D. Steffen is also a passive owner of Big Dog Solutions Group, LLC, an advertising, marketing and branding firm. Clients are not solicited to invest in the firm.

Item 5: Additional Compensation

Dewey D. Steffen does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Carmela Eastin, Chief Compliance Officer of Great Lakes Wealth, LLC, supervises and monitors Dewey D. Steffen's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. Eastin if you have any questions about Dewey D. Steffen's brochure supplement at (248) 378-1200.

Item 7: Requirements for State-Registered Advisers

Dewey D. Steffen has not been involved in any arbitration claim alleging damages in excess of \$2,500. 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.



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Part 2B of Form ADV: Brochure Supplement for

Loyd Benjamin Wellman



LANGTREE WEALTH

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This brochure supplement provides information about Loyd Wellman that supplements our firm brochure. You should have received a copy of that brochure. Please contact, Carmela Eastin, Chief Compliance Officer, if you did not receive the disclosure of Great Lakes Wealth, LLC and its dba LangTree Wealth or if you have any questions about the contents of this supplement. Additional information about Loyd Wellman is available on the SEC's website at www.adviserinfo.sec.gov.

Date: October 2017

Item 2: Educational Background & Business Experience

Loyd Benjamin Wellman

Year of Birth: 1989

Educational Background:

- 2007 - 2012: Central Michigan University; Bachelor of Arts in Accounting and Finance

Business Background:

- 03/2016 – Present Great Lakes Wealth, LLC; Investment Adviser Representative
- 05/2012 – 02/2017 Foresters Financial, Inc./ First Investors Corporation; Registered Representative
- 12/2014 – 05/2015 Estate of Shirley Wakefield; Executor
- 05/2010 – 05/2012 Kroger; Grocery Clerk

Exams, Licenses & Other Professional Designations:

- 03/2017: Series 65 Exam
- 01/2015: Series 7 Exam
- 07/2012: Series 63 Exam
- 07/2012: Series 6 Exam
- 07/2012: MI Insurance Licensure

Item 3: Disciplinary Information

There are no legal or disciplinary events material to the evaluation of Mr. Wellman.

Item 4: Other Business Activities

Mr. Wellman 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.

Item 5: Additional Compensation

Mr. Wellman does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Carmela Eastin, Chief Compliance Officer of Great Lakes Wealth, LLC, supervises and monitors Mr. Wellman's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. Eastin if you have any questions about Mr. Wellman's brochure supplement at (248) 378-1200.

Item 7: Requirements for State-Registered Advisers

Mr. Wellman has not been involved in any arbitration claim alleging damages in excess of \$2,500. 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.



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Part 2B of Form ADV: Brochure Supplement for

Michael Peter Hartman



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This brochure supplement provides information about Michael Hartman that supplements our firm brochure. You should have received a copy of that brochure. Please contact, Carmela Eastin, Chief Compliance Officer, if you did not receive the disclosure of Great Lakes Wealth, LLC and its dba LangTree Wealth or if you have any questions about the contents of this supplement. Additional information about Michael Hartman is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

Michael P. Hartman

Year of Birth: 1977

Educational Background:

- 1997: Attended Michigan State University

Business Background:

- 07/2016 – Present Great Lakes Wealth, LLC; Chief Operating Officer
- 07/2016 – Present Purshe Kaplan Sterling Investments, Inc; Registered Representative
- 06/2008 – 07/2016 UBS Financial Services, Inc.; Registered Representative & Investment Adviser Representative
- 01/2003 – 06/2008 Chase Investment Services, Inc.; Registered Representative

Exams, Licenses & Other Professional Designations:

- 08/2001: Life Accident & Health Insurance Licensure
- 07/2001: Series 66 Exam
- 04/2000: Series 24 Exam
- 10/1998: Series 63 Exam
- 09/1998: Series 7 Exam

Item 3: Disciplinary Information

Michael Hartman was involved in a customer dispute which was settled on August 14, 2013. Michael Hartman was also involved in a customer dispute that lead to FINRA arbitration which was settled on July 22, 2011. For additional information please use the following website: www.adviserinfo.sec.gov and search by CRD# 5387378.

Item 4: Other Business Activities

Michael Hartman 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.

Michael Hartman is a registered representative of Purshe Kaplan Sterling Investments, member FINRA/SIPC. He may offer securities and receive normal and customary commissions as a result of securities transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation Michael Hartman may earn.

Item 5: Additional Compensation

Michael Hartman does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Carmela Eastin, Chief Compliance Officer of Great Lakes Wealth, LLC, supervises and monitors Mr. Hartman's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. Eastin if you have any questions about Mr. Hartman's brochure supplement at (248) 378-1200.

Item 7: Requirements for State-Registered Advisers

Michael Hartman has not been involved in any arbitration claim alleging damages in excess of \$2,500. 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.