

Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
November 2017

Bradley C. Barnes

Entruity Wealth, LLC
11601 Bolthouse Drive, Suite 120
Bakersfield, CA, 93311
www.Entruity.com

This brochure supplement provides information about Mr. Barnes that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Barnes if you did not receive Entruity Wealth, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Barnes is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD #726498.

Item 2: Educational Background & Business Experience

Bradley Calvin Barnes

Year of Birth: 1958

Educational Background:

- 1980: University of Southern California; Bachelor of Science in Business Administration

Business Background:

- 07/2017 – Present Entruity Wealth, LLC; Managing Member, Chief Compliance Officer, & Investment Adviser Representative
- 07/2017 – Present Purshe Kaplan Sterling Investments, Inc.; Registered Representative
- 01/2015 – 07/2017 Morgan Stanley Private Bank; Senior Vice President & Wealth Advisor
- 06/2009 – 07/2017 Morgan Stanley Smith Barney; Senior Vice President & Wealth Advisor
- 08/2007 – 06/2009 Morgan Stanley & Co., Inc.; Senior Vice President & Wealth Advisor
- 07/1993 – 08/2007 Salomon Smith Barney, Inc./Citigroup Global Markets, Inc.; Senior Vice President & Wealth Advisors

Exams, Licenses & Other Professional Designations:

- 2006: Certified Kingdom Advisor (CKA)
- 1992: Series 65 Exam
- 1984: CERTIFIED FINANCIAL PLANNER, CFP®
- 1981: Series 7 & 63 Exams
- 1981: CA Insurance License [Life-Only, Accident and Health, Variable Contracts]

To obtain the CKA designation, applicants must first complete the university-based Core Training through Kingdom Advisors, Inc. This training combines financial leadership concepts with biblical principles, equipping advisors with the ability to apply biblical financial wisdom in client settings. Core training consists of a 21 module course which cover topics ranging from biblical worldview and leadership to investments and wealth transfer planning. Applicants must pass a test for each section with a minimum score of 80%. Once this training has been completed, applicants must complete the CKA application and hold one of the following designations as a prerequisite: CFP®, ChFC®, CPA, CPA/PFS, EA, CFA, CIMA®, AAMS, CLU®, JD (10 years of experience in the financial planning service may be substituted in lieu of a professional designation). Annual renewal requirements include the completion of 10 hours continuing education with Kingdom Advisors, Inc., payment of annual dues, active Kingdom Advisors membership, and completion of an online annual renewal.

The CFP® certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam and agreeing to be bound by the CFP® board's *Standard of Professional Conduct*. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per

year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the *Standards of Professional Conduct*.

Item 3: Disciplinary Information¹

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

Item 4: Other Business Activities

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

Item 5: Additional Compensation

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

Item 6: Supervision

Mr. Barnes is the Managing Member and Chief Compliance Officer of Entruity Wealth, LLC 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. Barnes 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.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.