

## **Form ADV Part 2B – Brochure Supplement**

**for**

**David G. Green  
President and Chief Compliance Officer**

**Effective: May 30, 2018**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of David G. Green (CRD# **4899414**) in addition to the information contained in the Ever Green Wealth Management (“Ever Green” or the “Advisor”, CRD # 297459) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the Ever Green Disclosure Brochure or this Brochure Supplement, please contact us at (585) 727-0736.

Additional information about Mr. Green is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD# **4899414**.

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**Ever Green Wealth Management, LLC**

1160A Pittsford Victor Road

Pittsford, NY 14534

Phone: (585) 727-0736 Fax: (585) 486-3943

## Item 2 – Educational Background and Business Experience

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David G. Green, born in 1970, is dedicated to advising Clients of Ever Green as the President and Chief Compliance Officer.

Additional information regarding Mr. Green's employment history is included below.

### Employment History:

President and Chief Compliance Officer, Ever Green Wealth Management, LLC	05/2018 to Present
Financial Advisor / Registered Representative, Edward Jones	11/2004 to 05/2018

### Exams, Licenses & Other Professional Designations:

- 02/2015 – Accredited Asset Management Specialist ("AAMS®")
- 3/2005 – Series 66 Exam
- 03/2005 – Series 7 Exam

The College for Financial Planning® awards the AAMS® 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 and Terms and Conditions. Applicants must also disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. The AAMS program is developed in conjunction with some of the nation's top investment firms. Applicants use case studies based on real-life scenarios designed to prepare them to be effective in the real world and build lasting relationships with clients.

Continued use of the AAMS® designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the AAMS® 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

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***There are no legal, civil or disciplinary events to disclose regarding Mr. Green*** has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Green.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Green.***

However, we do encourage you to independently view the background of Mr. Green on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD# **4899414**.

## Item 4 – Other Business Activities

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### Insurance Agency Affiliations

Mr. Green is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart Mr. Green's role with Ever Green Wealth Management. As an insurance professional, Mr. Green may receive customary commissions and other related revenues from the various insurance companies whose products are sold. Mr. Green is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This may cause a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Green or the Advisor.

**Item 5 – Additional Compensation**

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Mr. Green has additional business activities that are detailed in Item 4 above.

**Item 6 – Supervision**

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Mr. Green serves as the President and Chief Compliance Officer and Chief Compliance Officer of Ever Green Wealth Management. Mr. Green can be reached at (585) 727-0736.

Ever Green has implemented a Code of Ethics and internal compliance that guide each Supervised Person in meeting their fiduciary obligations to Clients of Ever Green. Further, Ever Green is subject to regulatory oversight by various agencies. These agencies require registration by Ever Green and its Supervised Persons. As a registered entity, Ever Green is subject to examinations by regulators, which may be announced or unannounced. Ever Green is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

**Item 7 – Requirements for State Registered Advisors**

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Mr. Green does not have any additional information to disclose.

## Privacy Policy

Effective Date: May 30, 2018

### Our Commitment to You

Ever Green Wealth Management ("Ever Green" or the "Advisor") is committed to safeguarding the use of personal information of our Clients (also referred to as "you" and "your") that we obtain as your Investment Advisor, as described here in our Privacy Policy ("Policy").

Our relationship with you is our most important asset. We understand that you have entrusted us with your private information, and we do everything that we can to maintain that trust. Ever Green (also referred to as "we", "our" and "us") protects the security and confidentiality of the personal information we have and implements controls to ensure that such information is used for proper business purposes in connection with the management or servicing of our relationship with you.

Ever Green does not sell your non-public personal information to anyone. Nor do we provide such information to others except for discrete and reasonable business purposes in connection with the servicing and management of our relationship with you, as discussed below.

Details of our approach to privacy and how your personal non-public information is collected and used are set forth in this Policy.

### Why you need to know?

Registered Investment Advisors ("RIAs") must share some of your personal information in the course of servicing your account. Federal and State laws give you the right to limit some of this sharing and require RIAs to disclose how we collect, share, and protect your personal information.

### What information do we collect from you?

Social security or taxpayer identification number	Assets and liabilities
Name, address and phone number(s)	Income and expenses
E-mail address(es)	Investment activity
Account information (including other institutions)	Investment experience and goals

### What Information do we collect from other sources?

Custody, brokerage and advisory agreements	Account applications and forms
Other advisory agreements and legal documents	Investment questionnaires and suitability documents
Transactional information with us or others	Other information needed to service account

### How do we protect your information?

To safeguard your personal information from unauthorized access and use we maintain physical, procedural and electronic security measures. These include such safeguards as secure passwords, encrypted file storage and a secure office environment. Our technology vendors provide security and access control over personal information and have policies over the transmission of data. Our associates are trained on their responsibilities to protect Client's personal information.

We require third parties that assist in providing our services to you to protect the personal information they receive from us.

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### How do we share your information?

An RIA shares Client personal information to effectively implement its services. In the section below, we list some reasons we may share your personal information.

Basis For Sharing	Do we share?	Can you limit?
<b>Servicing our Clients</b> We may share non-public personal information with non-affiliated third parties (such as administrators, brokers, custodians, regulators, credit agencies, other financial institutions) as necessary for us to provide agreed upon services to you, consistent with applicable law, including but not limited to: processing transactions; general account maintenance; responding to regulators or legal investigations; and credit reporting.	Yes	No
<b>Marketing Purposes</b> Ever Green does not disclose, and does not intend to disclose, personal information with non-affiliated third parties to offer you services. Certain laws may give us the right to share your personal information with financial institutions where you are a customer and where Ever Green or the client has a formal agreement with the financial institution. <b>We will only share information for purposes of servicing your accounts, not for marketing purposes.</b>	No	Not Shared
<b>Authorized Users</b> Your non-public personal information may be disclosed to you and persons that we believe to be your authorized agent(s) or representative(s).	Yes	Yes
<b>Information About Former Clients</b> Ever Green does not disclose and does not intend to disclose, non-public personal information to non-affiliated third parties with respect to persons who are no longer our Clients.	No	Not Shared

### Changes to our Privacy Policy

We will send you a copy of this Policy annually for as long as you maintain an ongoing relationship with us.

Periodically we may revise this Policy, and will provide you with a revised policy if the changes materially alter the previous Privacy Policy. We will not, however, revise our Privacy Policy to permit the sharing of non-public personal information other than as described in this notice unless we first notify you and provide you with an opportunity to prevent the information sharing.

### Any Questions?

You may ask questions or voice any concerns, as well as obtain a copy of our current Privacy Policy by contacting us at (585) 727-0736.