

Brochure Supplement

DECEMBER 11, 2018

Andrew M. Basinger



1741 Tiburon Drive
Wilmington, NC 28403

(910) 550-2261

This Brochure Supplement provides information about Andrew M. Basinger that supplements the Disclosure Brochure of Live Oak Private Wealth, LLC (hereinafter "LOPW"), a copy of which you should have received. Please contact LOPW's Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Andrew M. Basinger is available on the SEC's website at www.adviserinfo.sec.gov.

Live Oak Private Wealth, LLC, a Registered Investment Adviser

1741 Tiburon Drive, Wilmington, NC 28403 | (910) 550-2261
www.liveoakprivatewealth.com

Item 2. Educational Background and Business Experience

Born 1971

Post-Secondary Education

UNC Chapel Hill Kenan Flagler School of Business | MBA, Finance | 2001

Hampden-Sydney College | BA, Economics | 1994

Recent Business Background

Live Oak Private Wealth, LLC | Investment Adviser Representative | August 2018 – Present

Wells Fargo | Wealth Advisor | August 2004 – August 2018

Professional Designation

Andrew M. Basinger holds the professional designation of CERTIFIED FINANCIAL PLANNER™ (“CFP®”).

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. (the “CFP Board”) to individuals who meet its education, examination, experience and ethics requirements. Eligible candidates are generally required to have three years of financial planning related experience and possess a bachelor’s degree from an accredited U.S. college or university. Certificants are further required to complete a CFP Board-Registered Education Program (or possess a qualifying professional credential), clear a personal and professional background check, and pass the CFP® Certification Examination, a ten-hour multiple choice exam divided into three separate sessions. In order to maintain the certification, CFP® designees must also complete at least 30 hours of continuing education every two years on an ongoing basis.

For additional information about this credential, please refer directly to the website of the issuing organization.

Item 3. Disciplinary Information

LOPW is required to disclose information regarding any legal or disciplinary events material to a client’s evaluation of Andrew M. Basinger. LOPW has no information to disclose in relation to this Item.

Item 4. Other Business Activities

LOPW is required to disclose information regarding any investment-related business or occupation in which Andrew M. Basinger is actively engaged. LOPW has no information to disclose in relation to this Item.

Item 5. Additional Compensation

LOPW is required to disclose information regarding any arrangement under which Andrew M. Basinger receives an economic benefit from someone other than a client for providing investment advisory services. LOPW has no information to disclose in relation to this Item.

Item 6. Supervision

Jason Carroll, CEO and Chief Compliance Officer, is generally responsible for supervising Andrew M. Basinger's advisory activities on behalf of LOPW. The telephone number to reach Jason Carroll is (910) 550-2261.

LOPW supervises its personnel and the investments made in client accounts. LOPW monitors the investments recommended by Andrew M. Basinger to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. LOPW periodically reviews the advisory activities of Andrew M. Basinger, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Andrew M. Basinger.

Item 7. Requirements for State Registered Advisers

LOPW is required to disclose information regarding Andrew M. Basinger's involvement in certain civil, self-regulatory organization or administrative proceedings, arbitration awards or findings, or bankruptcy proceedings. LOPW has no information to disclose in relation to this Item.