



**Brochure Supplement Cover Page
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**Arcadia Wealth Management, Inc.
Form ADV Part 2B Brochure Supplement
10 Edgewood Avenue
Smithtown, NY 11787**

Walter Wisniewski, President
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This Form ADV2B ("Brochure Supplement") provides information about the qualifications and business practices of Arcadia Wealth Management, Inc. ("Arcadia" with CRD# **165504**). If you have any questions about the contents of this Brochure Supplement, please contact us at (631) 549-5400. The information in this Brochure Supplement has not been approved or verified by the United States Securities and Exchange Commission ("SEC") or by any state securities authority.

Additional information about Arcadia is also available on the SEC's website at www.advisorinfo.sec.gov.

Arcadia is a registered investment adviser; registration does not imply a certain level of skill or training.

REGISTERED INVESTMENT ADVISOR

Arcadia Wealth Management 10 Edgewood Avenue Smithtown, NY 11787

PHONE (631) 549-5400 **FAX** (631) 863-2706

Brochure Supplement

The following Form ADV Part 2B Brochure Supplement covers all employees of Arcadia authorized to give investment advice to clients. Those employees authorized to give investment advice to clients include:

Walter F Wisniewski, Jr. – CFP[®], President

Allison Vanaski – CFP[®], Senior Financial Planner, VP of Investments

Walter F Wisniewski, Jr., President
CERTIFIED FINANCIAL PLANNER™ practitioner
Arcadia Wealth Management
10 Edgewood Avenue
Smithtown, NY 11787
(631) 549-5400
walter@arcadiawm.com

Background and Business Experience

- **Born:** 7/12/1952
- **Education**
M.A., Education, Columbia University, 1976
B.A. in Music, Manhattan School of Music, 1974
- **Professional Experience**
Arcadia Wealth Management, Inc., President (9/12 - present)
Paragon Capital Management Corp., President - Financial Planning (5/93 – 09/17)
Walter F. Wisniewski, Sole Proprietor - Financial Planning (1/91 - 5/93)
Benjamin Securities, Financial Planner (9/89 - 5/91)
Prudential-Bache Securities, Financial Planner (3/83 - 4/89)
- **Professional Licenses and Designations**
The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP® marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- **Education** – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP® Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP® Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- **Experience** – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- **Ethics** – Agree to be bound by CFP® Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- **Continuing Education** – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and

- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP® Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

- **Professional Organization Memberships**

Financial Planning Association

Rotary International

Disciplinary Information

Walter Wisniewski has not been the subject of any criminal or civil investment-related actions, or any violation of an investment-related statute or regulation. He has also not been the subject of any administrative proceedings before the SEC or any other federal, state, or foreign regulatory authority causing him to be denied authorization to act in any investment-related business or activity.

However, we do encourage you to independently view the background of Mr. Wisniewski on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching by his name or his CRD# **1125987**.

Other Business Activity

Walter Wisniewski is dedicated to the investment advisory activities of Arcadia's Clients. Walter Wisniewski does not have any other business activities.

Additional Compensation

Walter Wisniewski receives compensation only for providing advisory services to clients of Arcadia.

Supervision

As President of Arcadia, Mr. Wisniewski supervises all employees. Arcadia's client accounts are reviewed by periodically by Mr. Wisniewski and Ms. Vanaski in an attempt to ensure that each client portfolio has been invested in compliance within the investment guidelines approved by the client. Ms. Vanaski can be reached at (631) 549-5400.

Allison Vanaski
CERTIFIED FINANCIAL PLANNER™ practitioner
Senior Financial Planner, VP of Investments
Arcadia Wealth Management
10 Edgewood Avenue
Smithtown, NY 11787
(631) 549-5400

Background and Business Experience

- **Born:** 7/4/1983
- **Education**
B.S., Finance, Villanova University, 2005
- **Professional Experience**
Arcadia Wealth Management, Inc., Senior Financial Planner, VP of Investments (01/14 – present)
Paragon Capital Management Corp., Senior Financial Planner, VP of Investments (01/14 – 09/17)
Arcadia Wealth Management, Inc., Chief Operations Officer (9/12 -1/14)
Paragon Capital Management Corp., Chief Operations Officer (2/12 – 1/14)
Knight Capital Americas, Assistant Vice President (7/08-2/12)
Lehman Brothers, Financial Analyst (8/05-7/08)
- **Professional Licenses and Designations**
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The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- **Education** – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP® Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP® Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- **Experience** – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- **Ethics** – Agree to be bound by CFP® Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- **Continuing Education** – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and

- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP® Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Allison Vanaski is also a member of the National Association of Personal Financial Advisors (NAPFA).

Disciplinary Information

Allison Vanaski has not been the subject of any criminal or civil investment-related actions, or any violation of an investment-related statute or regulation. He has also not been the subject of any administrative proceedings before the SEC or any other federal, state, or foreign regulatory authority causing him to be denied authorization to act in any investment-related business or activity.

However, we do encourage you to independently view the background of Ms. Vanaski on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching by her full name or her Individual CRD# 4830183.

Other Business Activity

Allison Vanaski is dedicated to the investment advisory activities of Arcadia's Clients. Allison Vanaski does not have any other business activities.

Additional Compensation

Allison Vanaski receives compensation only for providing advisory services for clients of Arcadia.

Supervision

Arcadia's President, Walter Wisniewski, supervises Allison Vanaski. Mr. Wisniewski supervises the advice that Ms. Vanaski provides to clients on an ongoing basis by reviewing her preparation for, performance during, and follow-up after client meetings and other communications. Mr. Wisniewski can be reached at (631) 549-5400.