

**Item 1: Cover Page**  
**Part 2B of Form ADV: Brochure Supplement**  
**August 2020**

**Kary Jay Bartmasser**

**KB Private Wealth Management Group LLC**  
**8913 W Olympic Blvd, Suite 205**  
**Beverly Hills, CA 90211**  
**[www.kbwealthmanagementgroup.com](http://www.kbwealthmanagementgroup.com)**

**Firm Contact:**  
**Kary Bartmasser**  
**Chief Compliance Officer**

This brochure supplement provides information about Mr. Bartmasser that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Bartmasser if you did not receive KB Private Wealth Management Group LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Bartmasser is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #4880672.

## Item 2: Educational Background & Business Experience

**Kary Jay Bartmasser**

**Year of Birth:** 1952

### **Educational Background:**

- 1985: Golden Gate University; Courses in Advanced Taxation
- 1974: California State University, Northridge; Bachelor of Science in Accounting
- 1972: Santa Monica College; Associate of Arts in Business

### **Business Background:**

- 06/2020 – Present KB Private Wealth Management Group LLC; Managing Member & Chief Compliance Officer
- 02/2005 – Present Bartmasser & Co, CPAs; Owner
- 08/2005 – 11/2019 Wealth Resources Group; Investment Adviser Representative

### **Exams, Licenses & Other Professional Designations:**

- 07/2005: Series 65 Exam
- 10/1984: CA Real Estate Broker License ID: 00874524
- 06/1976: Certified Public Accountant (CPA)

### **Certified Public Accountant (CPA):**

CPAs are licensed and regulated by their state boards of accountancy. Experience and testing requirements for licensure as a CPA generally include minimum college education, minimum experience levels, and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of continuing professional education. Additionally, CPAs are required to follow a rigorous *Code of Professional Conduct* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

## Item 3: Disciplinary Information<sup>1</sup>

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

<sup>1</sup> 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.

#### **Item 4: Other Business Activities**

Mr. Bartmasser is a Certified Public Accountant and the owner of Bartmasser & Co, CPAs, an accounting and tax practice separate from KB Private Wealth Management Group LLC. In such capacity, he may also provide income tax preparation or accounting services. These services are independent of our firm's financial planning and investment advisory services and are governed under a separate engagement agreement. Clients have the option of engaging our representative for tax preparation or accounting services, however, they are under no obligation to do so.

Mr. Bartmasser is a licensed real estate agent. As such, he may receive normal and customary fees associated with real estate transactions in their independent capacities. These services are separate from our firm's advisory services and are governed under a separate agreement. Clients are under no obligation to engage our representative for these and will not be actively solicited.

#### **Item 5: Additional Compensation**

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

#### **Item 6: Supervision**

Mr. Bartmasser is the sole owner and Chief Compliance Officer 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. Bartmasser 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.