

**PHILIP A. SWISHER**

**FOUNDER & CEO, TREVIAN WEALTH MANAGEMENT, LLC**

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This brochure supplement provides information about Philip A. Swisher that supplements the disclosure brochure of Trevian Wealth Management, LLC (hereinafter "Trevian Wealth Management"), a copy of which you should have received. Please contact Trevian Wealth Management'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 Philip A. Swisher is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) or by contacting the Massachusetts Securities Division.

## **Item 2. Educational Background and Business Experience**

Born 1978

### **Post-Secondary Education**

Harvard Business School, M.B.A., 2006

Williams College, B.A. in economics, 2001

### **Recent Business Background**

Trevian Wealth Management, LLC, Managing Member, February 2015 – present

Trevian Holdings, LLC, Managing Member, October 2016 – present

Part-time Instructor, Harvard University, August 2014 – present

Brown Brothers Harriman, Senior Vice President, June 2010 – February 2015

FHB Formation (a start-up which acquired Northeast Bancorp, a \$600mm in assets bank in Maine), Consultant, November 2009 – May 2010

Self-employed (Pursued various start-up ideas, one of which became Personal Capital), April 2009 – November 2009

The Kraft Group (holding company of the Kraft family, owners of the New England Patriots), General Manager, June 2006 – April 2009

Harvard Business School, Full-time Student, August 2004 – June 2006

Goldman Sachs, Analyst, July 2001 – August 2004

## **Item 3. Disciplinary Information**

Trevian Wealth Management is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Philip A. Swisher. Trevian Wealth Management has no information to disclose in relation to this Item.

## **Item 4. Other Business Activities**

Trevian Wealth Management is required to disclose information regarding any investment-related business or occupation in which Philip A. Swisher is actively engaged. Trevian Wealth Management has no information to disclose in relation to this Item.

Philip A. Swisher is actively involved in the entrepreneurial and innovation ecosystems, which aligns with the client focus of Trevian Wealth Management, which is on entrepreneurs and investors. He currently teaches a two-day executive education class on innovation and strategy at Harvard University, advises the CEO of the Perkins School for the Blind on innovation, and is a mentor for the Techstars start-up accelerator in Boston. He also periodically advises corporate executives on their innovation strategy, teaches innovation classes at venues other than Harvard, and helps entrepreneurs grow their companies. These activities collectively consume less than 5% of his time.

In addition, he is the Founder, CEO and sole owner of an affiliated consulting firm, Trevian Holdings, LLC, which provides consulting services primarily to businesses. The consulting services are typically providing business management advice and strategic advice to companies, and assisting the leaders of companies with scaling their businesses and with growth strategies. Clients of Trevian Wealth Management are under no obligation to hire Trevian Holdings for any consulting services. The two companies are complementary, as Trevian Holdings focuses on work that is outside of the normal scope of Trevian Wealth Management, so conflicts are unlikely. Should there ever be a conflict or potential conflict, it will be disclosed to all parties, who will then proceed by mutual agreement. Trevian Holdings consumes approximately 10% of Philip Swisher's time.

## **Item 5. Additional Compensation**

Trevian Wealth Management is required to disclose information regarding any arrangement under which Philip A. Swisher receives an economic benefit from someone other than a client for providing investment advisory services. Trevian Wealth Management has no information to disclose in relation to this Item.

## **Item 6. Supervision**

Philip A. Swisher is the Founder, CEO, Managing Member, and Chief Compliance Officer of Trevian Wealth Management and is generally responsible for his own supervision. Philip A. Swisher seeks to ensure that investments are suitable for his individual clients and consistent with their individual needs, goals, objectives and risk tolerance, as well as any restrictions requested by Trevian Wealth Management's clients.

## **Item 7. Requirements for State Registered Advisers**

Trevian Wealth Management is required to disclose information regarding Philip A. Swisher's involvement in certain civil, self-regulatory organization or administrative proceedings, arbitration awards or findings, or bankruptcy proceedings. Philip A. Swisher has not been involved in any legal or disciplinary events.