

# ACCESS FIDUCIARY SERVICES LLC

## FORM ADV PART 2B

BROCHURE SUPPLEMENT

APRIL 5, 2021

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## MICHAEL HALLORAN

CHIEF COMPLIANCE OFFICER,  
INVESTMENT ADVISOR REPRESENTATIVE

INDIVIDUAL CRD NO. 5074100

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This brochure supplement (“Supplement Brochure”) dated April 5, 2021 provides information about Michael Halloran that supplements the Access Fiduciary Services LLC’s (“AFS” or the “Firm”) Part 2A of Form ADV (“Brochure”). You should have received a copy of that brochure. Please contact Michael Halloran if you did not receive AFS’s Brochure or if you have any questions about the contents of this Supplement Brochure.

Additional information about Michael Halloran is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). The site is searchable by a unique identifying number known as a CRD number. Michael Halloran’s CRD number is 5074100.

## ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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**Michael Halloran**

**CRD No: 5074100**

**Born: 1983**

### EDUCATIONAL BACKGROUND

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Georgetown University – Marketing and Small Business Management

### BUSINESS EXPERIENCE

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12/2020 – Present	CCO; Investment Advisor Representative,	Access Fiduciary Services LLC
10/2020 – Present	Senior Vice President,	Shepherd Kaplan LLC
05/2007 – 10/2020	Financial Advisor,	Shepherd Kaplan LLC

### PROFESSIONAL DESIGNATIONS, LICENSING & EXAMS

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#### *Securities Licenses*

#### State Securities Law Exam

Series 65 - Uniform Investment Advisor Law Examination

## ITEM 3: DISCIPLINARY INFORMATION

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There are no legal, civil or disciplinary events to disclose regarding Mr. Halloran. Mr. Halloran 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. Halloran.

## ITEM 4: OTHER BUSINESS ACTIVITIES

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Mr. Halloran is a dually registered as an investment advisor representative with Shepherd Kaplan LLC. He spends approximately 40 hours per week providing investment advisory services to clients. Dual registration may pose a conflict of interest based on compensation received rather than client needs. Mr. Halloran and AFS are committed to acting in the client's best interest. Any compensation is fully disclosed, in advance, to the client. Client may pay for advisory services under the Firm.

## ITEM 5: ADDITIONAL COMPENSATION

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Mr. Halloran holds an investment advisory position at Shepherd Kaplan LLC and receives compensation for advisory services rendered through that firm.

## ITEM 6: SUPERVISION

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Michael Halloran is the Chief Compliance Officer and Investment Advisor Representative of AFS. AFS provides investment advisory services in accordance with its policies and procedures manual. As AFS's Chief Compliance Officer, Michael Halloran is responsible for the implementation of the Firm's policies and procedures. Michael Halloran may be contacted at (202) 302-7117 or [mhalloran@accessretirementsolutions.com](mailto:mhalloran@accessretirementsolutions.com) for more information about this Brochure Supplement.