



Brochure Supplement Form ADV Part 2B

Bannerman Wealth Management Group, LLC

CRD #284677

SEC# 801-117777

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The following provides information about Bannerman Wealth Management Group, LLC's (BWMG) personnel that supplements the BWMG Disclosure Brochure. Please contact Joshua Bannerman, Chief Compliance Officer, if you did not receive the Brochure or if you have any questions about the contents of this supplement. Additional information about the firm's personnel is available on the SEC's website at www.adviserinfo.sec.gov

In this supplement, acronyms are used to convey certain designations obtained by BWMG's personnel. Please see below for an explanation of any acronyms used:

CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) 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 68,000 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.

Joshua K. Bannerman, CFP®
CRD #3263257

Josh was born in 1977 and graduated from Walsh College in 2009 with a BBA in Business after several years in the United States Marine Corps. He also earned an MBA and a M.S. in Finance from Walsh College in 2010.

Business Experience

- 05/2009 – Present, Bannerman Wealth, Managing Partner and Chief Compliance Officer
- 07/1999 - 05/2009, Ameriprise Financial, Financial Advisor & Managing Principal
- 06/1996 - 02/2002, United States Marine Corps, Team Leader

Other Business Activities & Disciplinary Disclosures

Joshua Bannerman currently is the owner and CEO of Bannerman Insurance Group, LLC, an insurance agency licensed in the state of Michigan. Mr. Bannerman spends less than 5 hours a month on this business. He is also the owner and CEO of Verios Advisory Group, LLC a tax-preparation firm. During the tax season, he prepares around 20 tax returns for select clients.

Joshua Bannerman is a co-owner at SB Podcast LLC.

Mr. Bannerman has never been involved in any arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Additional Compensation & Supervision

Joshua's only compensation for providing investment advisory and financial planning services comes from his regular salary and ownership of Bannerman Wealth.

Through his ownership of Bannerman Insurance Group, LLC and Verios Advisory Group, LLC, Mr. Bannerman occasionally receives ownership distributions from those firms. Clients are under no obligation or commitment to purchase services from either affiliated firm as a condition of being a client of Bannerman Wealth.

Joshua is the Managing Partner of the firm. He doesn't have a direct supervisor, however, all employees and advisors of Bannerman Wealth are required to follow written supervisory guidelines and procedures which are intended and designed to ensure compliance with necessary and applicable federal, state, and local securities laws and regulations.

Jennifer Pritchard, CFP®
CRD #6070060

Jen was born in 1993 and graduated from Texas Tech University in 2014 with a degree in Personal Financial Planning. She earned her CFP® designation in 2017.

Business Experience

- 10/2019 - Present, Bannerman Wealth, Financial Planner
- 11/2018 - 10/2019 - Geometric Wealth Advisors, LLC, Financial Planner
- 07/2017 - 11/2018 - FIT Advisors, LLC, Financial Planner

Other Business Activities & Disciplinary Disclosures

Jen Pritchard is the co-owner of Simply Paraplanner, a financial planner placement and outsourcing agency. Ms. Pritchard spends 20 hours a month in this business.

Ms. Pritchard has never been involved in any arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Additional Compensation & Supervision

Jen's only compensation for providing investment advisory and financial planning services comes from her regular salary.

Jen is supervised by Joshua Bannerman, the firm's Managing Partner and owner. Joshua can be reached at (214) 919-4448. All employees and advisors of Bannerman Wealth are required to follow written supervisory guidelines and procedures which are intended and designed to ensure compliance with necessary and applicable federal, state, and local securities laws and regulations.