

Kathleen W. Burkett, CFP®
Triangle Wealth Management
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www.trianglewealth.com

January 4, 2021

This brochure supplement provides information about Kathleen W. Burkett that supplements the Triangle Wealth Management ("TWM") brochure. You should have received a copy of that brochure. Please contact Cathy Thomas at our main number above or via email at cthomas@trianglewealth.com if you did not receive the TWM brochure or any questions about this supplement's contents.

Additional information about Ms. Burkett is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Kathleen W. Burkett, b. June 5, 1965

Educational Background

Penn State University – BS, Accounting (1987)

CPA (1989)

CERTIFIED FINANCIAL PLANNER™ (CFP®, 1995)

To qualify for licensure as a Certified Public Accountant (CPA), an individual must pass the Uniform Certified Public Accountant (CPA) Examination. CPAs are the only licensed accounting professionals. State boards of accountancy issue CPA licenses – there is no national CPA licensure process in the US. The purpose of the Uniform CPA Examination is to provide reasonable assurance to Boards of Accountancy (the state entities that have statutory authority to issue licenses) that those who pass the CPA Examination possess the level of technical knowledge and the skills necessary for initial licensure in the protection of the public interest. In addition to the uniform examination, education and experience requirements may vary from state to state. Candidates for CPA licensure must meet all three requirements. As a result, passing the CPA Examination is not sufficient – in itself – to qualify for licensure. Most states/jurisdictions require at least a bachelor's degree and at least two years of public accounting experience to be eligible to become a CPA.

The CERTIFIED FINANCIAL PLANNER™ (CFP®) designation is issued by the Certified Financial Planner Board of Standards, Inc. Candidates are required to complete a CFP-board registered program. They must also pass the CFP Certification Examination, administered in 10 hours over two days. The exam includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's financial planning knowledge to real-world circumstances. Certified individuals are required to complete 30 hours of continuing education every two years, including two hours on the Code of Ethics and other parts of the Standard of Professional Conduct. As a prerequisite to sitting for the CFP Certification Examination, candidates must hold a bachelor's degree (or higher)

from an accredited college or university and have at least three years of full-time personal financial planning experience.

Business Experience

Firm	Position	Dates
Triangle Wealth Management	Managing Director, Financial Planner	2011-Present
Triangle Securities, LLC	Managing Director, Financial Planner	2005-2017

Item 3 - Disciplinary Information

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events that would be material to your evaluation of the representative. Ms. Burkett has no information applicable to this Item.

Item 4 - Other Business Activities

Advisors are required to disclose other investment-related businesses or activities, such as registration as a broker-dealer registered representative, futures commission merchant, commodity pool operator, commodity trading advisor, or any other business activities that provide a substantial amount of time or source of income. Ms. Burkett has no information applicable to this Item.

Item 5 - Additional Compensation

Ms. Burkett does not receive compensation for advisory services other than fees paid by the client.

Item 6 - Supervision

Ms. Burkett is supervised by Cathy Thomas, Chief Compliance Officer. Cathy Thomas can be reached at (919) 838-3221.

Ms. Burkett is required to adhere to TWM's processes and procedures, as described in our Code of Ethics. We will monitor the advice that Ms. Burkett gives you by reviewing the relevant account opening documentation when the relationship is established and reviewing client correspondence periodically. In addition, your Investment Advisor reviews your account activity periodically to ensure that trading is in line with your stated objectives. Following these reviews, reports are prepared to assist Ms. Thomas in supervising and monitoring your account. Factors considered include but are not limited to the following: investment objectives, targeted allocation, current allocation, suitability, performance, number of trades, monthly distributions, concentrated positions, diversification, and outside holdings.

Scott W. Loyek, CFA®
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This brochure supplement provides information about Scott W. Loyek that supplements the Triangle Wealth Management ("TWM") brochure. You should have received a copy of that brochure. Please contact Cathy Thomas at our main number above or via email at cthomas@trianglewealth.com if you did not receive the TWM brochure or any questions about this supplement's contents.

Additional information about Mr. Loyek is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Scott W. Loyek, b. October 8, 1976

Educational Background

Wake Forest University – BA, Economics
Chartered Financial Analyst® (CFA®)

The CFA Institute issues the Chartered Financial Analyst® (CFA®) designation after candidates pass three-course exams involving 250 hours of self-study time for each of the three levels. To qualify to sit for the exams, candidates must have an undergraduate degree or four years of qualified professional experience or a combination of work and college experience that totals at least four years. Candidates are also required to sign a Professional Conduct Statement and a Candidate Responsibility Statement.

Business Experience

Firm	Position	Dates
Triangle Wealth Management	Managing Director	2009-Present
Triangle Securities, LLC	Registered Representative	2006-2017
Oak Value Capital Management, Inc.	Relationship Manager	2003-2006

Item 3 - Disciplinary Information

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events that would be material to your evaluation of the representative. Mr. Loyek has no information applicable to this Item.

Item 4 - Other Business Activities

Advisors are required to disclose other investment-related businesses or activities, such as registration as a broker-dealer registered representative, futures commission merchant, commodity pool operator, commodity trading advisor, or any other business activities that provide a substantial amount of time or source of income. Mr. Loyek has no information applicable to this Item.

Item 5 - Additional Compensation

Mr. Loyek does not receive compensation for advisory services other than fees paid by the client.

Item 6 - Supervision

Mr. Loyek is supervised by Cathy Thomas, Chief Compliance Officer. Cathy Thomas can be reached at (919) 838-3221.

Mr. Loyek must adhere to TWM's processes and procedures, as described in our Code of Ethics. We will monitor the advice that Mr. Loyek gives you by reviewing the relevant account opening documentation when the relationship is established and reviewing client correspondence periodically. In addition, your Investment Advisor reviews your account activity periodically to ensure that trading is in line with your stated objectives. Following these reviews, reports are prepared to assist Ms. Thomas in supervising and monitoring your account. Factors considered include but are not limited to the following: investment objectives, targeted allocation, current allocation, suitability, performance, number of trades, monthly distributions, concentrated positions, diversification, and outside holdings.

J. Lee Parker, CRPC®
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This brochure supplement provides information about J. Lee Parker that supplements the Triangle Wealth Management ("TWM") brochure. You should have received a copy of that brochure. Please contact Cathy Thomas at our main number above or via email at cthomas@trianglewealth.com if you did not receive the TWM brochure or any questions about this supplement's contents.

Additional information about Mr. Parker is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

J. Lee Parker, CRPC® (b. September 19, 1961)

Educational Background

UNC at Chapel Hill – Bachelor of Arts

Chartered Retirement Planning CounselorSM (CRPC®)

The College for Financial Planning issues the Chartered Retirement Planning CounselorSM (CRPC®) designation. Candidates must complete a study program, successfully pass a final examination, and comply with the Code of Ethics. The CRPC Program focuses on the pre-and post-retirement needs of individuals and encompasses various principles in the retirement planning field, including estate planning and asset management. Certified individuals are required to complete 16 hours of continuing education every two years.

Business Experience

Firm	Position	Dates
Triangle Wealth Management	Sr. Vice President, Investment Advisor	2009-Present
Triangle Securities, LLC	Registered Representative	2000-2018

Item 3 - Disciplinary Information

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events that would be material to your evaluation of the representative. Mr. Parker has no information applicable to this Item.

Item 4 - Other Business Activities

Advisors are required to disclose other investment-related businesses or activities, such as registration as a broker-dealer registered representative, futures commission merchant, commodity pool operator, commodity trading advisor, or any other business activities that provide a substantial amount of time or source of income. Mr. Parker has no information applicable to this Item.

Item 5 - Additional Compensation

Mr. Parker does not receive compensation for advisory services other than fees paid by the client.

Item 6 - Supervision

Mr. Parker is supervised by Cathy Thomas, Chief Compliance Officer. Cathy Thomas can be reached at (919) 838-3221.

Mr. Parker must adhere to TWM's processes and procedures, as described in our Code of Ethics. We will monitor the advice that Mr. Parker gives you by reviewing the relevant account opening documentation when the relationship is established and reviewing client correspondence periodically. In addition, your Investment Advisor reviews your account activity periodically to ensure that trading is in line with your stated objectives. Following these reviews, reports are prepared to assist Ms. Thomas in supervising and monitoring your account. Factors considered include but are not limited to the following: investment objectives, targeted allocation, current allocation, suitability, performance, number of trades, monthly distributions, concentrated positions, diversification, and outside holdings.

Paul D. Reynolds, III
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This brochure supplement provides information about Paul D. Reynolds, III that supplements the Triangle Wealth Management ("TWM") brochure. You should have received a copy of that brochure. Please contact Cathy Thomas at our main number above or via email at cthomas@trianglewealth.com if you did not receive the TWM brochure or any questions about this supplement's contents.

Additional information about Mr. Reynolds is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Paul D. Reynolds, III, b. June 14, 1952

Educational Background

Ferrum College – AA, Liberal Arts

Averett College – BS, Business Administration

Business Experience

Firm	Position	Dates
Triangle Wealth Management	Managing Director	2009-Present
Triangle Securities, LLC	Managing Director	2000-2018

Item 3 - Disciplinary Information

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events that would be material to your evaluation of the representative. Mr. Reynolds has no information applicable to this Item.

Item 4 - Other Business Activities

Advisors are required to disclose other investment-related businesses or activities, such as registration as a broker-dealer registered representative, futures commission merchant, commodity pool operator, commodity trading advisor, or any other business activities that provide a substantial amount of time or source of income. Mr. Reynolds has no information applicable to this Item.

Item 5 - Additional Compensation

Mr. Reynolds does not receive compensation for advisory services other than fees paid by the client.

Item 6 - Supervision

Mr. Reynolds is supervised by Cathy Thomas, Chief Compliance Officer. Cathy Thomas can be reached at (919) 838-3221.

Mr. Reynolds must adhere to TWM's processes and procedures, as described in our Code of Ethics. We will monitor the advice that Mr. Reynolds gives you by reviewing the relevant account opening documentation when the relationship is established and reviewing client correspondence periodically. In addition, your Investment Advisor reviews your account activity periodically to ensure that trading is in line with your stated objectives. Following these reviews, reports are prepared to assist Ms. Thomas in supervising and monitoring your account. Factors considered include but are not limited to the following: investment objectives, targeted allocation, current allocation, suitability, performance, number of trades, monthly distributions, concentrated positions, diversification, and outside holdings.

Cathy L. Thomas, CRPS®
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This brochure supplement provides information about Cathy L. Thomas that supplements the Triangle Wealth Management ("TWM") brochure. You should have received a copy of that brochure. Please contact Cathy Thomas at our main number above or via email at cthomas@trianglewealth.com if you did not receive the TWM brochure or any questions about this supplement's contents.

Additional information about Ms. Thomas is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Cathy L. Thomas, b. May 16, 1959

Educational Background

Attended classes at Old Dominion University
Chartered Retirement Plans SpecialistSM (CRPS®)

The Chartered Retirement Plans SpecialistSM (CRPS®) designation is issued by the College for Financial Planning. Candidates must complete a study program, successfully pass a final examination, and comply with the Code of Ethics. The curriculum is based on a client-centered, problem-solving method that uses case studies to give students a hands-on approach to the material. The program focuses on the design, installation, maintenance, and administration of retirement plans. Certified individuals are required to complete 16 hours of continuing education every two years.

Business Experience

Firm	Position	Dates
Triangle Wealth Management	Managing Director, Principal	2009-Present
Triangle Securities, LLC	Managing Director, Principal	2000-2018

Item 3 - Disciplinary Information

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events that would be material to your evaluation of the representative. Ms. Thomas has no information applicable to this Item.

Item 4 - Other Business Activities

Advisors are required to disclose other investment-related businesses or activities, such as registration as a broker-dealer registered representative, futures commission merchant, commodity pool operator, commodity trading advisor, or any other business activities that provide a substantial amount of time or source of income. Ms. Thomas has no information applicable to this Item.

Item 5 - Additional Compensation

Ms. Thomas does not receive compensation for advisory services other than fees paid by the client.

Item 6 - Supervision

Ms. Thomas is supervised by Cathy Thomas, Chief Compliance Officer. Cathy Thomas can be reached at (919) 838-3221.

Ms. Thomas is required to adhere to TWM's processes and procedures, as described in our Code of Ethics. We will monitor the advice that Ms. Thomas gives you by reviewing the relevant account opening documentation when the relationship is established and reviewing client correspondence periodically. In addition, your Investment Advisor reviews your account activity periodically to ensure that trading is in line with your stated objectives. Following these reviews, reports are prepared to assist Ms. Thomas in supervising and monitoring your account. Factors considered include but are not limited to the following: investment objectives, targeted allocation, current allocation, suitability, performance, number of trades, monthly distributions, concentrated positions, diversification, and outside holdings.

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This brochure supplement provides information about Paul D. Reynolds, IV that supplements the Triangle Wealth Management ("TWM") brochure. You should have received a copy of that brochure. Please contact Cathy Thomas at our main number above or via email at cthomas@trianglewealth.com if you did not receive the TWM brochure or any questions about this supplement's contents.

Additional information about Mr. Reynolds is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Paul D. Reynolds, IV, b. December 7, 1984

Educational Background

Campbell University, Bachelor of Business Administration
Accredited Wealth Management Advisor®

The Accredited Wealth Management AdvisorSM (AWMA®) designation is granted to individuals who have completed a course of study encompassing wealth strategies, equity-based compensation plans, tax reduction alternatives, and asset protection alternatives. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. Designees must agree to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Sixteen hours of continuing education is required every two years to maintain the designation.

Business Experience

Firm	Position	Dates
Triangle Wealth Management	Relationship Manager	2012-Present
PDR Advisors	Portfolio Analyst	2011-2012
Triangle Securities Wealth Management, LLC	Relationship Manager	2009-2011
Triangle Securities, LLC	Relationship Manager	2008-2009

Item 3 - Disciplinary Information

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events that would be material to your evaluation of the representative. Mr. Reynolds has no information applicable to this Item.

Item 4 - Other Business Activities

Advisors are required to disclose other investment-related businesses or activities, such as registration as a broker-dealer registered representative, futures commission merchant, commodity pool operator, commodity trading advisor, or any other business activities that provide a substantial amount of time or source of income. Mr. Reynolds has no information applicable to this Item.

Item 5 - Additional Compensation

Mr. Reynolds does not receive compensation for advisory services other than fees paid by the client.

Item 6 - Supervision

Mr. Reynolds is supervised by Cathy Thomas, Chief Compliance Officer. Cathy Thomas can be reached at (919) 838-3221.

Mr. Reynolds must adhere to TWM's processes and procedures, as described in our Code of Ethics. We will monitor the advice that Mr. Reynolds gives you by reviewing the relevant account opening documentation when the relationship is established and reviewing client correspondence periodically. In addition, your Investment Advisor reviews your account activity periodically to ensure that trading is in line with your stated objectives. Following these reviews, reports are prepared to assist Ms. Thomas in supervising and monitoring your account. Factors considered include but are not limited to the following: investment objectives, targeted allocation, current allocation, suitability, performance, number of trades, monthly distributions, concentrated positions, diversification, and outside holdings.

Michelle L. Petruolo
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This brochure supplement provides information about Michelle L. Petruolo that supplements the Triangle Wealth Management ("TWM") brochure. You should have received a copy of that brochure. Please contact Cathy Thomas at our main number above or via email at cthomas@trianglewealth.com if you did not receive the TWM brochure or any questions about this supplement's contents.

Additional information about Ms. Petruolo is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Michelle Petruolo, b. December 1963

Educational Background

Ms. Petruolo has no formal education after high school.
Accredited Wealth Management Advisor®

The Accredited Wealth Management AdvisorSM (AWMA[®]) designation is granted to individuals who have completed a course of study encompassing wealth strategies, equity-based compensation plans, tax reduction alternatives, and asset protection alternatives. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. Designees must agree to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Sixteen hours of continuing education is required every two years to maintain the designation.

Business Experience

Firm	Position	Dates
Triangle Wealth Management	Senior Relationship Manager	2009-Present
Triangle Securities, LLC	Registered Rep	2003-2017
Wachovia Securities, Inc.	Registered Rep	2000-2002
Wachovia Bank	Account Manager	1986-2000

Item 3 - Disciplinary Information

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events that would be material to your evaluation of the representative. Ms. Petruolo has no information applicable to this Item.

Item 4 - Other Business Activities

Advisors are required to disclose other investment-related businesses or activities, such as registration as a broker-dealer registered representative, futures commission merchant, commodity pool operator, commodity trading advisor, or any other business activities that provide a substantial amount of time or source of income. Ms. Petruolo has no information applicable to this Item.

Item 5 - Additional Compensation

Ms. Petruolo does not receive compensation for advisory services other than fees paid by the client.

Item 6 - Supervision

Ms. Petruolo is supervised by Cathy Thomas, Chief Compliance Officer. Cathy Thomas can be reached at (919) 838-3221.

Ms. Petruolo is required to adhere to TWM's processes and procedures, as described in our Code of Ethics. We will monitor the advice that Ms. Petruolo gives you by reviewing the relevant account opening documentation when the relationship is established and reviewing client correspondence periodically. In addition, your Investment Advisor reviews your account activity periodically to ensure that trading is in line with your stated objectives. Following these reviews, reports are prepared to assist Ms. Thomas in supervising and monitoring your account. Factors considered include but are not limited to the following: investment objectives, targeted allocation, current allocation, suitability, performance, number of trades, monthly distributions, concentrated positions, diversification, and outside holdings.

L. Tanner Crawford, CFA®, CIPM®
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This brochure supplement provides information about L. Tanner Crawford that supplements the Triangle Wealth Management ("TWM") brochure. You should have received a copy of that brochure. Please contact Cathy Thomas at our main number above or via email at cthomas@trianglewealth.com if you did not receive the TWM brochure or any questions about this supplement's contents.

Additional information about Mr. Crawford is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

L. Tanner Crawford b. July 14, 1975

Educational Background

University of North Carolina at Chapel Hill – BS, Business Administration
CFA® (2005)
CIPM® (2017)

The CFA Institute issues the Chartered Financial Analyst® (CFA®) designation after candidates pass three-course exams involving 250 hours of self-study time for each of the three levels. To qualify to sit for the exams, candidates must have an undergraduate degree or four years of qualified professional experience or a combination of work and college experience that totals at least four years. Candidates are also required to sign a Professional Conduct Statement and a Candidate Responsibility Statement.

CIPM® and Certificate in Investment Performance Measurement™. The Certificate in Investment Performance Management (CIPM) Program develops competent, ethical professionals who know how to measure, present, and explain complex investment performance data. The CIPM® Program content is organized around six main topic areas: ethics, performance measurement, attribution, appraisal and presentation and manager selection. To become a CIPM designation holder, you must enroll in and successfully complete the CIPM Program Levels I and II offered through the CFA Institute, fulfill the four-year professional work experience requirement, become a CFA Institute member and maintain your membership and complete 15 hours of qualifying continuing professional development annually.

Business Experience

Firm	Position	Dates
Triangle Wealth Management	Investment Analyst, Portfolio Manager	2014-Present

Item 3 - Disciplinary Information

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events that would be material for your evaluation of the representative. Mr. Crawford has no information applicable to this Item.

Item 4 - Other Business Activities

Advisors are required to disclose other investment-related businesses or activities, such as registration as a broker-dealer registered representative, futures commission merchant, commodity pool operator, commodity trading advisor, or any other business activities that provide a substantial amount of time or source of income. Mr. Crawford has no information applicable to this Item.

Item 5 - Additional Compensation

Mr. Crawford does not receive compensation for advisory services other than fees paid by the client.

Item 6 - Supervision

Mr. Crawford is supervised by Cathy Thomas, Chief Compliance Officer. Cathy Thomas can be reached at (919) 838-3221.

Mr. Crawford is required to adhere to TWM's processes and procedures, as described in our Code of Ethics. We will monitor the advice that Mr. Crawford gives you by reviewing the relevant account opening documentation when the relationship is established and reviewing client correspondence periodically. In addition, your Investment Advisor reviews your account activity periodically to ensure that trading is in line with your stated objectives. Following these reviews, reports are prepared to assist Ms. Thomas in supervising and monitoring your account. Factors considered include but are not limited to the following: investment objectives, targeted allocation, current allocation, suitability, performance, number of trades, monthly distributions, concentrated positions, diversification, and outside holdings.