

# WealthEdge Investment Advisors LLC

## Part 2B of Form ADV – Brochure Brochure Supplement: Gerard Addeo, CPA

**Updated: March 31, 2021**

99 Park Avenue, Suite 1920  
New York, NY 10016

Telephone: (212) 687-3600  
CRD# 126337/ SEC File # 801-66845

---

***This brochure supplement provides information about Gerard Addeo that supplements WealthEdge's Form ADV, Part 2 brochure. You should have received a copy of that brochure.*** Please contact us at **212-687-3600** or by email at [g.addeo@wealthedge.com](mailto:g.addeo@wealthedge.com) if you did not receive **WealthEdge's** Brochure or if you have any questions about the contents of this supplement.

---

## **Item 2 Educational Background and Business Experience Gerard Addeo, CPA, Born 1957**

### *Post-Secondary Education:*

- BA in Accounting from Fordham University in New York, NY
- Certified Public Accountant.

### *Recent Business Background:*

2012 - Present: Founder of WealthEdge Advisors LLC

1999 - Present: Founder of WealthEdge Investment Advisors LLC

1985 - Present: Founder of WealthEdge Tax Advisors LLC

**Certified Public Accountant (CPA)** is the title of qualified accountants in numerous countries in the English-speaking world. In the United States they will have passed the Uniform Certified Public Accountant Examination and will have met additional state education and experience requirements for membership in their respective professional accounting bodies and certification as a CPA.

In order to become a CPA in the United States, the candidate must sit for and pass the Uniform Certified Public Accountant Examination (Uniform CPA Exam), which is set by the American Institute of Certified Public Accountants (AICPA) and administered by the National Association of State Boards of Accountancy (NASBA).

Eligibility to sit for the Uniform CPA Exam is determined by individual state boards of accountancy. All states have adopted what is known as the "150 hour rule" (150 college semester units or the equivalent), which usually requires an additional year of education past a regular 4 year college degree, or a master's degree.

Over 40 of the state boards now require applicants for CPA status to complete a special examination on ethics, which is effectively a *fifth exam* in terms of requirements to become a CPA. The majority of these will accept the AICPA self-study *Professional Ethics for CPAs* CPE course or another course in general professional ethics. Many states, however, require that the ethics course include a review of that state's specific rules for professional practice. To learn more about the CPA designation visit [www.nasba.org](http://www.nasba.org)

## **Item 3 Disciplinary Information**

None

---

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

As noted above in Item 2, Mr. Addeo is also a Certified Public Accountant and financial planner. Whenever Mr. Addeo recommends either of those services to an advisory client, and he himself will be the paid provider of that recommended service, such a situation inherently creates a potential conflict of interest. As a fiduciary, Mr. Addeo must recommend only those services and products that are in a client's own best interest, free of any influence of possible gain for himself. The firm addresses this possible conflict of interest by disclosing it to the firm's clients.

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

As described in Item 2, Mr. Addeo does receive compensation for CPA and planning services provided.

#### **Item 6 Supervision**

WealthEdge has developed a Code of Conduct (the “Code”) to support our value statements, protect the interests of our clients and reinforce our reputation for non-negotiable integrity by avoiding even the appearance of impropriety in the conduct of our business. The Code is intended to promote awareness and serve as a guide for all of associates. The Code summarizes the values and standards of conduct which WealthEdge believes are critical. It is each employee’s responsibility to understand and adhere to the requirements of the Code and other company policies, as well as applicable laws, regulations and rules. All associates are required to certify in writing upon hire and annually thereafter that they (i) received a copy of the Code, (ii) read and understand it and (iii) agree to comply with its terms.

Gerard Addeo is the Chief Compliance Officer for WealthEdge Investment Advisors. He can be reached at 212-687-3600. Mr. Addeo reviews all material investment policy changes, and conducts periodic assessments to ensure that client objectives and mandates are being met.

# WealthEdge Investment Advisors LLC

## Part 2B of Form ADV – Brochure Brochure Supplement: Mark Salerno, CFP®

**Updated: March 31, 2021**

99 Park Avenue, Suite 1920  
New York, NY 10016

Telephone: (212) 687-3600  
CRD# 126337/ SEC File # 801-66845

---

***This brochure supplement provides information about Mark Salerno that supplements WealthEdge's Form ADV, Part 2 brochure. You should have received a copy of that brochure. Please contact us at 212-687-3600 or by email at [g.addeo@wealthedge.com](mailto:g.addeo@wealthedge.com) if you did not receive WealthEdge's Brochure or if you have any questions about the contents of this supplement.***

***Additional information about Mark Salerno is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)***

---

## **Item 2 Educational Background and Business Experience Mark Salerno, CFP®, Born 1961**

### *Post-Secondary Education:*

- Bachelor's Degree in Business Management from Syracuse University

### *Recent Business Background:*

2015 – Present: WealthEdge Investment Advisors – Director of Risk Management

2015 – 2016: First Liberties Financial, Registered Representative

2000 – 2015: Genesis Financial Advisory Services, LLC - President/ Managing Member, Chief Compliance Officer and Investment Advisor Representative

2000 – 2015: United Planners' Financial Services of America, Registered Representative

1988 – Present: Insurance Broker

The **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.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete a CFP Board Registered Program and attain a Bachelor's Degree or higher from an accredited college or 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 – The CFP® exam is a 170-question, multiple-choice test that consists of two 3-hour sessions over one day. The exam includes stand-alone and scenario-based questions, as well as questions associated with case studies. Candidates for CFP® certification must pass the CFP® exam, which tests your ability to apply financial planning knowledge to real-life situations. This comprehensive exam ensures that you are highly qualified to develop a holistic plan for your clients' finances;
-

- Experience – Complete either 6,000 hours of professional experience related to the financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements;
- Ethics – Commit to acting as a fiduciary, which means acting in the best interests of the client at all times when providing financial advice — and commit to other high ethical and conduct standards.

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.

### **Item 3 Disciplinary Information**

None

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

As noted above in Part 2A, Mr. Salerno is a licensed insurance agent. As a fiduciary, Mr. Salerno must recommend only those services and products that are in a clients’ best interest, free of any influence of possible gain for himself. The firm addresses this possible conflict of interest by disclosing it to the firm’s clients.

### **Item 5 Additional Compensation**

None

---

## **Item 6 Supervision**

WealthEdge has developed a Code of Conduct (the “Code”) to support our value statements, protect the interests of our clients and reinforce our reputation for non-negotiable integrity by avoiding even the appearance of impropriety in the conduct of our business. The Code is intended to promote awareness and serve as a guide for all of associates. The Code summarizes the values and standards of conduct which WealthEdge believes are critical. It is each employee’s responsibility to understand and adhere to the requirements of the Code and other company policies, as well as applicable laws, regulations and rules. All associates are required to certify in writing upon hire and annually thereafter that they (i) received a copy of the Code, (ii) read and understand it and (iii) agree to comply with its terms.

Mr. Mark Salerno is supervised by Mr. Gerard Addeo. Mr. Addeo can be reached at 212-687-3600 or [g.addeo@wealthedge.com](mailto:g.addeo@wealthedge.com). Frequent meetings are held between Mr. Addeo, Mr. Salerno and Mr. Hasan to review and discuss overall portfolio positioning and performance.

# **WealthEdge Investment Advisors LLC**

## **Part 2B of Form ADV – Brochure Brochure Supplement: Fahad Hasan, CFA**

**Updated: March 31, 2021**

99 Park Avenue, Suite 1920  
New York, NY 10016

Telephone: (212) 687-3600  
CRD# 126337/ SEC File # 801-66845

---

***This brochure supplement provides information about Fahad Hasan that supplements WealthEdge's Form ADV, Part 2 brochure. You should have received a copy of that brochure. Please contact us at 212-687-3600 or by email at [g.addeo@wealthedge.com](mailto:g.addeo@wealthedge.com) if you did not receive WealthEdge's Brochure or if you have any questions about the contents of this supplement.***

***Additional information about Fahad Hasan is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)***

---



**Item 2 Educational Background and Business Experience Fahad Hasan, CFA Born 1981***Post-Secondary Education:*

- B.B.A. w/ a major in Finance from James Madison University in Harrisonburg, VA
- CFA charter holder
- Registered Representative – Purshe Kaplan Sterling Investments

*Recent Business Background:*

2017 – Present: WealthEdge Investment Advisors – Senior Portfolio Strategist

2012 – 2017: Voya FA – Financial Advisor

2005 – 2012: Worldwide Wealth Management – Wealth Manager

Chartered Financial Analyst (CFA): Chartered Financial Analysts are licensed by the CFA Institute to use the CFA mark. CFA certification requirements:

- Hold a bachelor's degree from an accredited institution or have equivalent education or work experience.
- Successful completion of all three exam levels of the CFA Program.
- Have 48 months of acceptable professional work experience in the investment decision making process.
- Fulfill society requirements, which vary by society. Unless you are upgrading from affiliate membership, all societies require two sponsor statements as part of each application; these are submitted online by your sponsors.
- Agree to adhere to and sign the Member's Agreement, a Professional Conduct Statement, and any additional documentation requested by CFA Institute.

**Item 3 Disciplinary Information**

None

**Item 4 Other Business Activities**

As noted above in Item 2, Mr. Hasan is a registered representative for Purshe Kaplan Sterling (PKS). PKS is a full service broker-dealer and financial services firm headquartered in Albany, New York. PKS is registered with the US Securities and Exchange Commission and is a member of FINRA. PKS clears through National Financial Services LLC. Mr. Hasan is also a licensed insurance agent. As a fiduciary, Mr. Hasan must recommend only those services and products that are in a clients' best interest, free of any influence of possible gain for himself. The firm addresses this possible conflict of interest by disclosing it to the firm's clients.

**Item 5 Additional Compensation**

None

---

## **Item 6 Supervision**

WealthEdge has developed a Code of Conduct (the “Code”) to support our value statements, protect the interests of our clients and reinforce our reputation for non-negotiable integrity by avoiding even the appearance of impropriety in the conduct of our business. The Code is intended to promote awareness and serve as a guide for all of associates. The Code summarizes the values and standards of conduct which WealthEdge believes are critical. It is each employee’s responsibility to understand and adhere to the requirements of the Code and other company policies, as well as applicable laws, regulations and rules. All associates are required to certify in writing upon hire and annually thereafter that they (i) received a copy of the Code, (ii) read and understand it and (iii) agree to comply with its terms.

As Senior Portfolio Strategist of WealthEdge Investment Advisors LLC, Mr. Hasan is supervised by Mr. Gerard Addeo, President. Frequent meetings are held between Mr. Hasan and Mr. Addeo to review and discuss overall portfolio positioning and performance. Mr. Addeo can be reached by phone at 212-687-3600 or by email at [g.addeo@wealthedge.com](mailto:g.addeo@wealthedge.com).

# WealthEdge Investment Advisors LLC

## Part 2B of Form ADV – Brochure Brochure Supplement: Stan Kagan, CPA

**Updated: March 31, 2021**

99 Park Avenue, Suite 1920  
New York, NY 10016

Telephone: (212) 687-3600  
CRD# 126337/ SEC File # 801-66845

---

***This brochure supplement provides information about Stan Kagan that supplements WealthEdge's Form ADV, Part 2 brochure. You should have received a copy of that brochure. Please contact us at 212-687-3600 or by email at [g.addeo@wealthedge.com](mailto:g.addeo@wealthedge.com) if you did not receive WealthEdge's Brochure or if you have any questions about the contents of this supplement.***

---

## **Item 2 Educational Background and Business Experience Stan Kagan, CPA, Born 1984**

### *Post-Secondary Education:*

- BBA in Public Accounting from Pace University in New York, NY
- Certified Public Accountant.

### *Recent Business Background:*

2009 - Present: WealthEdge Tax Advisors LLC - Director of Taxation

2008 - 2009: J&I Tax Service Inc. - Accountant

2004 - 2008: Murray & Josephson CPA's, LLC - Accountant

**Certified Public Accountant (CPA)** is the title of qualified accountants in numerous countries in the English-speaking world. In the United States they will have passed the Uniform Certified Public Accountant Examination and will have met additional state education and experience requirements for membership in their respective professional accounting bodies and certification as a CPA.

In order to become a CPA in the United States, the candidate must sit for and pass the Uniform Certified Public Accountant Examination (Uniform CPA Exam), which is set by the American Institute of Certified Public Accountants (AICPA) and administered by the National Association of State Boards of Accountancy (NASBA).

Eligibility to sit for the Uniform CPA Exam is determined by individual state boards of accountancy. All states have adopted what is known as the "150 hour rule" (150 college semester units or the equivalent), which usually requires an additional year of education past a regular 4 year college degree, or a master's degree.

Over 40 of the state boards now require applicants for CPA status to complete a special examination on ethics, which is effectively a *fifth exam* in terms of requirements to become a CPA. The majority of these will accept the AICPA self-study *Professional Ethics for CPAs* CPE course or another course in general professional ethics. Many states, however, require that the ethics course include a review of that state's specific rules for professional practice. To learn more about the CPA designation visit [www.nasba.org](http://www.nasba.org)

## **Item 3 Disciplinary Information**

None

---

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

As noted above in Item 2, Mr. Kagan is also a Certified Public Accountant. Whenever Mr. Kagan recommends either of those services to an advisory client, and he himself will be the paid provider of that recommended service, such a situation inherently creates a potential conflict of interest. As a fiduciary, Mr. Kagan must recommend only those services and products that are in a client's own best interest, free of any influence of possible gain for himself. The firm addresses this possible conflict of interest by disclosing it to the firm's clients.

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

As described in Item 2, Mr. Kagan does receive compensation for CPA services provided.

#### **Item 6 Supervision**

WealthEdge has developed a Code of Conduct (the "Code") to support our value statements, protect the interests of our clients and reinforce our reputation for non-negotiable integrity by avoiding even the appearance of impropriety in the conduct of our business. The Code is intended to promote awareness and serve as a guide for all of associates. The Code summarizes the values and standards of conduct which WealthEdge believes are critical. It is each employee's responsibility to understand and adhere to the requirements of the Code and other company policies, as well as applicable laws, regulations and rules. All associates are required to certify in writing upon hire and annually thereafter that they (i) received a copy of the Code, (ii) read and understand it and (iii) agree to comply with its terms.

As Director of Taxation at WealthEdge Tax Advisors LLC, Mr. Kagan is supervised by Mr. Gerard Addeo, President. Mr. Addeo can be reached by phone at 212-687-3600 or by email at [g.addeo@wealthedge.com](mailto:g.addeo@wealthedge.com).

---

# WealthEdge Investment Advisors LLC

Part 2B of Form ADV – Brochure

Brochure Supplement: Yandie Liautaud, CFP®

**Updated: March 31, 2021**

99 Park Avenue, Suite 1920  
New York, NY 10016

Telephone: (212) 687-3600  
CRD# 126337/ SEC File # 801-66845

---

*This brochure supplement provides information about Yandie Liautaud that supplements WealthEdge's Form ADV, Part 2 brochure. You should have received a copy of that brochure. Please contact us at 212-687-3600 or by email at [g.addeo@wealthedge.com](mailto:g.addeo@wealthedge.com) if you did not receive WealthEdge's Brochure or if you have any questions about the contents of this supplement.*

*Additional information about Yandie Liautaud is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)*

---

**Item 2 Educational Background and Business Experience Yandie Liautaud, CFP®, Born 1980**

*Post-Secondary Education:*

- Master of Business Administration from Zicklin School of Business – Baruch College

*Recent Business Background:*

2015 – Present: WealthEdge Advisors LLC – Director of Financial Planning

2003 – 2014: Genesis Financial Advisory Services, LLC – Financial Planner

The **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.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete a CFP Board Registered Program and attain a Bachelor’s Degree or higher from an accredited college or 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 – The CFP® exam is a 170-question, multiple-choice test that consists of two 3-hour sessions over one day. The exam includes stand-alone and scenario-based questions, as well as questions associated with case studies. Candidates for CFP® certification must pass the CFP® exam, which tests your ability to apply financial planning knowledge to real-life situations. This comprehensive exam ensures that you are highly qualified to develop a holistic plan for your clients' finances;
  - Experience – Complete either 6,000 hours of professional experience related to the financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements;
  - Ethics – Commit to acting as a fiduciary, which means acting in the best interests of the client at all times when providing financial advice — and commit to other high ethical and conduct standards.
-

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.

### **Item 3 Disciplinary Information**

None

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

As noted above in Part 2A, Ms. Liautaud is a Certified Financial Planner™. Her primary role is to provide fee based financial planning services. As a fiduciary, Ms. Liautaud must recommend only those services and products that are in a clients’ best interest, free of any influence of possible gain for herself. The firm addresses this possible conflict of interest by disclosing it to the firm’s clients.

### **Item 5 Additional Compensation**

None

### **Item 6 Supervision**

WealthEdge has developed a Code of Conduct (the “Code”) to support our value statements, protect the interests of our clients and reinforce our reputation for non-negotiable integrity by avoiding even the appearance of impropriety in the conduct of our business. The Code is intended to promote awareness and serve as a guide for all of associates. The Code summarizes the values and standards of conduct which WealthEdge believes are critical. It is each employee’s responsibility to understand and adhere to the requirements of the Code and other company policies, as well as applicable laws, regulations and rules. All associates are required to certify in writing upon hire and annually thereafter that they (i) received a copy of the Code, (ii) read and understand it and (iii) agree to comply with its terms.

Ms. Yandie Liautaud is supervised by Mr. Gerard Addeo. Mr. Addeo can be reached at 212-687-3600 or [g.addeo@wealthedge.com](mailto:g.addeo@wealthedge.com).

---