

**Item 1: Cover Page for Part 2B of Form ADV:  
Brochure Supplement  
March 2021**

**William Beltzhooover Conner**

**iTrust Asset Management, LLC  
3320 Bates Creek Road, Suite 100  
Lexington, Kentucky 40502  
(859) 425-1222**

**Firm Contact:  
Todd Stricklin, Managing Member and Chief Compliance Officer**

**This brochure supplement provides information about Mr. Conner that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Stricklin, Chief Compliance Officer if you did not receive iTrust Asset Management's brochure or if you have any questions about the contents of this supplement.**

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

## Item 2: Educational Background & Business Experience

**William Beltzhoover Conner**

**Year of Birth:** 1961

### **Educational Background:**

- 1984; Auburn University; BS Civil Engineering

### **Business Background:**

- 05/2012 – Present; LPL Financial; Registered Representative
- 05/2012 – Present; iTrust Asset Management, LLC; Managing Member/Financial Advisor
- 08/2002 – 05/2012; Morgan Keegan and Company, Inc.; Financial Advisor
- 06/1991 – 08/2002; J.B.B. Hilliard, W.L. Lyons, Inc.; Financial Advisor

### **Exams, Licenses and Other Professional Designations:**

- 01/2004 – Series 31
- 06/1991 – Series 7, 63
- 11/1999 – Series 65
- 11/1991 – KY Insurance License
- 11/2006 – AAMS®
- 05/2007 – AWMA®

### **AAMS® - Accredited Asset Management Specialist:**

The College for Financial Planning® awards the ACCREDITED ASSET MANAGEMENT SPECIALIST<sup>SM</sup> AND AAMS® designation to students who:

- successfully complete the program;
- pass the final examination; and
- comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct and Terms and Conditions. Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are required to be disclosed.

Students must sign and return the Code of Ethics forms within six months of passing the final exam. Failure to complete and submit the forms within this time frame may result in termination of the individual's candidacy. If an individual wishes to apply for authorization to use the Marks in the future, he or she may be required to fulfill the initial designation requirements in place at the time of passing the exam.

Successful students receive a certificate and are granted the right to use the designation on correspondence and business cards for a two-year period.

Continued use of the AAMS® designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the AAMS® designation by:

- completing 16 hours of continuing education;

- reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct; and
- paying a biennial renewal fee of \$75.

Detailed renewal requirements for the College for Financial Planning's professional designation programs can be found on [www.cffpalum.org/renewal](http://www.cffpalum.org/renewal).

## EXAMINATION

Students must test at a testing center and are eligible to take the final exam 24 hours after enrollment. The exam is a multiple-choice exam, offered electronically, permitting you to test at your convenience.

## CONTINUING EDUCATION CREDIT

The Accredited Asset Management Specialist<sup>SM</sup> Professional Designation Program is registered with CFP Board, NASBA, TX State Board of Accountancy, NJ State Board of Accountancy, and certain State Insurance departments for continuing education (CE) credit. The program may also qualify for firm element requirements of the securities industry.

## **AWMA<sup>®</sup> - Accredited Wealth Management Advisor<sup>SM</sup>**

The College for Financial Planning<sup>®</sup> awards the ACCREDITED WEALTH MANAGEMENT ADVISOR<sup>SM</sup> AND AWMA<sup>®</sup> designation to students who:

- successfully complete the program;
- pass the final examination; and
- comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct and Terms and Conditions. Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are required to be disclosed.

Successful students receive a certificate and are granted the right to use the designation on correspondence and business cards for a two-year period.

Continued use of the AWMA<sup>®</sup> designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the AWMA<sup>®</sup> designation by:

- completing 16 hours of continuing education;
- reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct; and
- paying a biennial renewal fee of \$75.

## Continuing Education Credit

The Accredited Wealth Management Advisor Professional Designation Program is registered with CFP Board, NASBA, TX State Board of Accountancy, NJ State Board of Accountancy, and certain State Insurance departments for continuing education (CE) credit. The program may also qualify for firm element requirements of the securities industry.

## Topics

- The Asset Management Process
- Investors, Policy & Change
- Risk, Return & Investment Performance
- Asset Allocation & Selection
- Investment Strategies
- Taxation of Investment Products
- Investment Opportunities for an Individual's Retirement
- Investment Considerations for Small-Business Owners
- Deferred Compensation & Other Benefit Plans for Key Executives
- Insurance Products for Investment Clients
- Estate Planning for Investment Clients
- Regulatory & Ethical Issues for the Investment Professional
- Risk Management & Investment Issues for High Net Worth Clients
- Income Tax & Executive Benefits Planning for High Net Worth Clients
- Estate Planning for High Net Worth Clients

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events material to the evaluation of Mr. Conner.

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

Mr. Conner is a licensed insurance agent. He may offer insurance products and receive normal and customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation he and/or our supervised persons may earn. He devotes approximately five-percent (5%) of his professional time on this other business.

Mr. Conner is a registered representative of LPL Financial LLC, member FINRA/SIPC. He may offer securities and receive normal and customary commissions as a result of securities transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation Mr. Conner may earn.

Mr. Conner is the owner of Aaron's Sales & Lease Ownership and offers non-investment related services. Mr. Conner devotes approximately 10% of his time to this activity.

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

Mr. Conner does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### **Item 6: Supervision**

Todd Stricklin, Managing Member and Chief Compliance Officer of iTrust Asset Management, LLC, supervises and monitors Mr. Conner's activities on a regular basis. Mr. Stricklin reviews all outgoing correspondence for written financial advice that Mr. Conner provides to his clients. Please contact Mr. Stricklin if you have any questions about Mr. Conner's brochure supplement at (859) 425-1222.

### **Item 7: Requirements for SEC-Registered Advisers**

Mr. Conner has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.