



## **Form ADV Part 2B – Brochure Supplement**

**for**

**Robert M. Hagopian  
Financial Advisor**

**Effective: March 18, 2021**

This Form ADV 2B ("Brochure Supplement") provides information about the background and qualifications of Robert M. Hagopian (CRD# 4372053) in addition to the information contained in the Ivy Wealth Management, Inc. ("IWM" or the "Advisor", CRD# 164557) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the IWM Disclosure Brochure or this Brochure Supplement, please contact us at (401) 681-4266 or by email at [info@ivywealth.net](mailto:info@ivywealth.net).

Additional information about Mr. Hagopian is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD# 4372053.

## Item 2 – Educational Background and Business Experience

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Robert M. Hagopian, born in 1957, is dedicated to advising Clients of IWM as a Financial Advisor. Mr. Hagopian also Bachelor of Arts and Sciences Boston College. Additional information regarding Mr. Hagopian's employment history is included below.

### Employment History:

Financial Advisor, Ivy Wealth Management, Inc.	12/2016 to Present
Wealth Management Advisor, Bank of America, NA	09/2009 to 12/2016
Financial Advisor, Merrill Lynch, Pierce, Fenner & Smith Inc.	06/2001 to 12/2016

## Item 3 – Disciplinary Information

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

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. *As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Hagopian.* However, we do encourage you to independently view the background of Mr. Hagopian on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD# 4372053.

## Item 4 – Other Business Activities

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Mr. Hagopian is dedicated to the investment advisory activities of IWM's Clients. Mr. Hagopian does not have any other business activities.

## Item 5 – Additional Compensation

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Mr. Hagopian is dedicated to the investment advisory activities of IWM's Clients. Mr. Hagopian does not receive any additional forms of compensation.

## Item 6 – Supervision

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Mr. Hagopian serves as a Financial Advisor of IWM and is supervised by Todd Sadwin, the Chief Compliance Officer. Mr. Sadwin can be reached at (401) 681-4266.

IWM has implemented a Code of Ethics and internal compliance that guides each Supervised Person in meeting their fiduciary obligations to Clients of IWM. Further, IWM is subject to regulatory oversight by various agencies. These agencies require registration by IWM and its Supervised Persons. As a registered entity, IWM is subject to examinations by regulators, which may be announced or unannounced. IWM is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.