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**Form ADV Part 2B
Brochure Supplement
for
Carrie Elizabeth Bertrand**

Date of Brochure: September 2nd, 2021

This brochure supplement provides information about Carrie Elizabeth Bertrand that supplements the Impact Partnership Wealth, LLC brochure. You should have received a copy of that brochure. Please contact Derrick Vermillion at (800) 380-5040 or dvermillion@ipwm.com if you did not receive Impact Partnership Wealth, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Carrie Elizabeth Bertrand is also available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Name: Carrie Elizabeth Bertrand

Year of Birth: 1967

Education: University of Oklahoma, Bachelor of Science in Education, 1990

Business

Background: Impact Partnership Wealth, LLC
Investment Adviser Representative, July 2021 - Present

Retirement Solutions, LLC
Independent Life Insurance Agent, January 1998 - Present

Investment Strategies, LLC
Investment Adviser Representative, December 2007 - July 2021

Item 3 – Disciplinary Information

Ms. Bertrand has no civil, criminal, administrative or regulatory events to report. Additional information regarding Ms. Bertrand's registration as an investment adviser can be found by accessing the SEC's public disclosure website at <https://www.adviserinfo.sec.gov>.

Item 4 – Other Business Activities

Ms. Bertrand is an independent life insurance agent who is appointed with various insurance carriers. In this capacity as independent life insurance agent of the insurance carriers, Ms. Bertrand can recommend / sale life insurance and fixed index annuity products. Ms. Bertrand utilizes the services of Gradient Annuity Brokerage an insurance marketing organization ("IMO"), to help her market her insurance related activities of recommending / selling life insurance and fixed index annuities.

Ms. Bertrand's life insurance and fixed index annuity clients can also be her clients of her registered investment adviser firm – the Impact Partnership Wealth, LLC. When Ms. Bertrand sells a life insurance product or fixed index annuity, Ms. Bertrand receives a commission from Ms. Bertrand's appointed insurance carrier and from Gradient Annuity Brokerage. This type of activity can create an incentive to recommend life insurance and fixed indexed annuity products. Impact Partnership Wealth, LLC. addresses this activity with appropriate disclosures and supervisory procedures, which require all investment advisory recommendations to be in the best interest of our clients. Clients are under no obligation to purchase any life insurance or fixed annuity product from Ms. Bertrand; and thus, may purchase their life insurance or fixed annuity products through another insurance agent of their choosing.

Ms. Bertrand is an independent life insurance agent of Retirement Solutions, LLC. Ms. Bertrand offers insurance and investment services and may offer those products to persons that are also clients of Impact Partnership Wealth, LLC. When she sells an insurance product, Ms. Bertrand receives a commission. This activity can create an incentive to recommend investment products based on the compensation received. Impact Partnership Wealth, LLC. addresses this activity with disclosures and supervisory procedures, which require all investment advisory recommendations to be in the best interest of our clients. Clients are under

no obligation to purchase any product or service and may do so through another insurance agent of their choosing.

Item 5 – Additional Compensation

Ms. Bertrand may receive compensation or benefits through her affiliation with Gradient Annuity Brokerage (and/or affiliated companies). Such additional compensation generally consists of cash bonus payments and reward trips based on insurance product sales performance. This activity can create an incentive to meet sales goals. Impact Partnership Wealth, LLC. addresses this activity with disclosures and supervisory procedures, which require all investment advisory recommendations to be in the best interests of our clients.

As an investment adviser representative of Impact Partnership Wealth, LLC, Ms. Bertrand can receive bonus payments from an insurance company for selling a targeted number of annuities during a specified period of time. Ms. Bertrand can also receive bonuses based on their overall assets under management during a specific period of time. These bonuses can include cash payments and/or qualification for networking and business trips. These benefits are not a result of achieving sales quotas related to specific product lines. Impact Partnership Wealth, LLC addresses this activity with disclosures and supervisory procedures, which require all investment advisory recommendations to be in the best interest of our clients, following procedures and the firm's fiduciary obligation to each client.

Item 6 – Supervision

Impact Partnership Wealth, LLC. and its investment adviser representatives provide investment advisory services in accordance with Impact Partnership Wealth, LLC's Written Supervisory Procedures. Our Written Supervisory Procedures include provisions for systematic reviews of the investment recommendations made by our representatives and of the securities that are held in our clients' accounts. Our Chief Compliance Officer, Derrick Vermillion is primarily responsible for the implementation of our Written Supervisory Procedures and overseeing the activities of our investment adviser representatives. Clients may contact Mr. Vermillion at (800) 380-5040 or dvermillion@ipwm.com with any questions regarding our supervision or compliance practices.

Item 7 – Requirements for State-Registered Advisers

Ms. Bertrand has not been found liable in any arbitration claim alleging in excess of \$2,500 or any civil, self-regulatory organization or administrative proceedings.

Ms. Bertrand has not been the subject of a bankruptcy petition.