

# McQueen Financial Advisors II, Inc.

1239 Anderson Road

Clawson, MI 48017

Phone: 248.548.8400

[www.m-f-a.com](http://www.m-f-a.com)

Brochure Supplement Date: March 31, 2022

This brochure supplement provides information about the investment advisors at McQueen Financial Advisors II, Inc. If you have any questions about the contents of this brochure, please contact us at 248.548.8400 or [info@m-f-a.com](mailto:info@m-f-a.com). The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

McQueen Financial Advisors II, Inc. is a registered investment adviser. Registration of an Investment Adviser does not imply any level of skill or training. The oral and written communications of an Adviser provide you with information about which you determine to hire or retain an Adviser. Additional information about McQueen Financial Advisors II, Inc. also is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

# Charles N. McQueen

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**Item 2: Educational Background and Business Experience**

Charles N. McQueen was born in 1970. He attended Western Michigan University and graduated with a BBA in Management. He founded McQueen Financial Advisors, Inc. in May of 1999. With over 25 years of experience, Charley oversees McQueen Financial Advisors core services of providing Investment Portfolio Management, Asset/Liability Management, Mortgage Servicing Rights valuations, branch and business valuations, and tactical consultation. Charley is a frequent speaker at financial institution conferences and has provided training and board education on investments, Asset/Liability Management, Mortgage Servicing Rights valuations, branch valuations, asset sales and strategic planning. Along with providing education to financial institutions, Charley provides training to several CPA firms and regulatory agencies.

**Item 3: Disciplinary Information**

No information is applicable to this Item.

**Item 4: Other Business Activities**

No information is applicable to this Item.

**Item 5: Additional Compensation**

No information is applicable to this Item.

**Item 6: Supervision**

Charley is President of McQueen Financial Advisors and also the Chief Compliance Officer who is responsible to provide supervisory oversight to all areas of the company. Charley may be contacted at the phone number as shown on the cover page.

# Craig M. Sicilia

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**Item 2: Educational Background and Business Experience**

Craig M. Sicilia was born in 1966. He attended Oakland University and graduated with a BBA Management. He was employed at JP Morgan Chase & Co. (and successor firms) from 1991 through 2006. He was a Vice President and a member of the Financial Strategies Team. Craig joined McQueen Financial Advisors in March 2006.

**Item 3: Disciplinary Information**

No information is applicable to this Item.

**Item 4: Other Business Activities**

Craig is a registered representative of a broker dealer, Calton & Associates. This does not create a material conflict of interest with any McQueen Financial Advisors' clients. Craig receives commission from Calton & Associates based on the purchase and sale of securities. Actions are taken to ensure there is no conflict of interest.

**Item 5: Additional Compensation**

No information is applicable to this Item.

**Item 6: Supervision**

Craig Sicilia is the Managing Director and is responsible to provide supervisory oversight to the investment team; however, Craig also participates as a team member in the investment and trading processes. Craig may be contacted at the phone number as shown on the cover page.

# Alicia M. Bradley

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**Item 2: Educational Background and Business Experience**

Alicia M. Bradley was born in 1982. She attended Macomb Community College and graduated with an Associate Degree in both General Business and Business Management. She was employed by a local firm from 2002 through 2011 in an accounting position. She subsequently joined McQueen Financial Advisors in June 2012.

**Item 3: Disciplinary Information**

No information is applicable to this Item.

**Item 4: Other Business Activities**

No information is applicable to this Item.

**Item 5: Additional Compensation**

No information is applicable to this Item.

**Item 6: Supervision**

Alicia is a Senior Investment Advisor at McQueen Financial Advisors as well as a member of the investment team. Investment decisions and portfolio activities are reviewed by at least 2 members of the investment team listed in this Group Brochure Supplement.

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# Zachary W. Whaley

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This brochure supplement provides information about Zachary W. Whaley that supplements the McQueen Financial Advisors II, Inc. brochure. You should have received a copy of that brochure. Please contact Charles N. McQueen, Chief Compliance Officer, if you did not receive McQueen Financial Advisor II, Inc.'s brochure or if you have any questions about the contents of this supplement.



**Item 2: Educational Background and Business Experience**

Zachary W. Whaley was born in 1983. He attended Oakland University and studied Finance. He was employed as Head Trader at Versaille Capital (Hedge Fund) and Operations Manager at Versa Media Capital (Fund) prior to joining McQueen Financial Advisors in February 2018.

**Item 3: Disciplinary Information**

No information is applicable to this Item.

**Item 4: Other Business Activities**

No information is applicable to this Item.

**Item 5: Additional Compensation**

No information is applicable to this Item.

**Item 6: Supervision**

Zach is a Senior Investment Advisor at McQueen Financial Advisors as well as a member of the investment team. Investment decisions and portfolio activities are reviewed by at least 2 members of the investment team listed in this Group Brochure Supplement.

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# Zachary R. Brown

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**Item 2: Educational Background and Business Experience**

Zachary Brown was born in 1995. He holds a Bachelor's of Business Administration-Finance from the University of Michigan. Before joining McQueen in 2020, Zack was a Commercial Credit Analyst at TCF Bank, an Equity Trader with Hantz Financial and a Credit Analyst Co-Op at First National Bank.

**Item 3: Disciplinary Information**

No information is applicable to this Item.

**Item 4: Other Business Activities**

No information is applicable to this Item.

**Item 5: Additional Compensation**

No information is applicable to this Item.

**Item 6: Supervision**

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