



# Triad Wealth Management

730 New Hampshire Street  
Suite 222  
Lawrence, KS 66044

Phone # (316) 361-7013

Form Adv Part 2B  
Brochure Supplement  
for  
Nick Whitaker

Date of Brochure: March 15, 2022

## Item 2 – Educational Background and Business Experience

Name: Nick Whitaker

Year of Birth: 1982

Education: Mr. Whitaker has no formal education after high school.

### Business

Background: Triad Wealth Management  
Investment Adviser Representative, 07/2021 – Present

Triad Partners  
Insurance Professional, 02/2021 – Present

President Detail Peoria  
Owner, 01/2018 – Present

First National Bank Tremont  
Financial Advisor, 01/2012 - 02/2021

Tremont First Financial Services  
Financial Advisor, 01/2012 – 02/2021

Global Financial Private Capital, Inc.  
Investment Adviser Representative, 06/2016-02/2018

## Item 3 – Disciplinary Information

Mr. Whitaker has no legal or disciplinary events that are material to a client's or prospective client's evaluation of him. Mr. Whitaker's registration may be located at <http://adviserinfo.sec.gov/>.

## Item 4 – Other Business Activities

Mr. Whitaker is also the Owner of President Detail Peoria, an automotive detailing company. Additionally, Mr. Whitaker is an Insurance Professional for Triad Partners, LLC.

Mr. Whitaker is not engaged in any other business or occupation that provides a substantial source of income to him or involves a substantial amount of time.

## Item 5 – Additional Compensation

Mr. Whitaker does not receive any additional compensation.

## Item 6 – Supervision

Mark Harper is the Chief Compliance Officer of Triad Wealth Management, LLC and is responsible for supervising advice provided to clients. Mr. Harper can be contacted at (316)361-7013.