



*Brochure Supplement*

**Michael Bennett Yongue**

**Private Wealth Partners, LLC**

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This brochure supplement provides information about Michael B. Yongue that supplements the Private Wealth Partners brochure. You should have received a copy of that brochure. Please contact a member of the client services team at [clientservices@pwpart.com](mailto:clientservices@pwpart.com) if you did not receive Private Wealth Partners' brochure or if you have any questions about the contents of this supplement

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

**Full Legal Name:** Michael Bennett Yongue

**Born:** 1982

### **Education:**

BA Political Science from San Diego State University, 2004

JD from California Western School of Law, 2007

### **Professional Designation:**

Chartered Financial Analyst (CFA®)<sup>1</sup>, CFA Institute 2021

### **Business Experience:**

Chief Compliance Officer – Private Wealth Partners 2022-Present

Wealth Management & Trust – Bank of Marin 2013-2022

Estate Planning & Tax – Law Offices of Julia Wald 2010-2013

Estate Planning & Tax – Richmond & Richmond 2007-2010

## **Item 3 Disciplinary Information:**

Mr. Yongue has no reportable disciplinary history.

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

Mr. Yongue is not actively engaged in any business or occupation outside of his employment with Private Wealth Partners, LLC.

## **Item 5 Additional Compensation:**

Mr. Yongue does not receive any economic benefit directly from any non-advisory client for the provision of advisory services.

## **Item 6 Supervision:**

Private Wealth Partners' President provides supervision of client accounts managed by Michael B. Yongue that includes review of account documentation, review of client correspondence and quarterly performance data, monitoring of security selection and allocation to clients and analysis of brokers used for trade execution. On a periodic basis the President meets with Mr. Yongue to discuss investment or administrative matters relating to specific client portfolios.

<sup>1</sup> *Chartered Financial Analyst (CFA®): The Chartered Financial Analyst (CFA) charter is a professional designation established in 1962 and awarded by CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investments topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable profession experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFRA Institute Code of Ethics and Standards of Profession Conduct. To learn more about CFA charter, visit [www.cfainstitute.org](http://www.cfainstitute.org).*