

**Brochure Supplement Form ADV Part 2B Item 1 - Cover Page**

**Peter Bisulca**

**CRD # 2367777**

**of**

**jhh wealth, llc**

**Main Office:**

330 E. Coffee Street Suite 4011  
Greenville, SC 29601  
(704) 332-2032

This brochure supplement provides information about Peter Bisulca, and supplements the jhh wealth, llc ("jhh") brochure. Please contact us at (704) 332-2032 if you have any questions about the contents of this supplement or jhh's brochure. If you have not received jhh wealth llc's brochure or if you have any questions about the contents of this supplement, you may also find information about jhh at [www.jhhwealth.com](http://www.jhhwealth.com).

Disclosure Information about the firm and associates may be obtained from your state's division of securities upon request. Additional information about Mr. Bisulca and the firm is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ***Item 2 Educational Background & Business Experience***

Peter is an entrepreneur at heart. He started the first decade of his career working inside Investments Banks on Wall St. Then for two decades, Peter worked inside Fortune 300 mutually owned financial institutions offering compressive financial, retirement, and estate planning services. Peter published the book, *The Wealth Creation Revelation, What Banks and Brokers Don't Want You to Know*. He is a licensed advisor and graduated with a Bachelor of Science Degree from Hofstra University in the area of Finance in 1994.

## ***Item 3 Disciplinary Information***

Advisers and associates are required to disclose any material facts regarding certain legal or disciplinary events information to report that would be material to your evaluation of an adviser. State and SEC registered advisers are also required to disclose all material facts regarding any event in which a supervised person of the firm was found liable in certain legal proceedings. There are no legal, civil, or disciplinary events to disclose regarding Mr. Bisulca. Mr. Bisulca 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. Bisulca. 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. Bisulca. However, we do encourage you to independently view the background of Mr. Bisulca on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

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

Mr. Bisulca has an association with Allen C. Ewing & Co., a registered broker dealer, member of FINRA/SIPC. Commissions received for registered broker dealer business is separate from any fees for RIA business. No compensation is received in addition to his salary and/or management fees with jhh. Business conducted through Allen C. Ewing & Co. is reviewed and approved by jhh management to ensure any conflict of interest is addressed. Mr. Bisulca also has an association with the Cliffco Mortgage Bankers and his own firm Selected Objectives, where he sells approved mortgage and insurance products that are outside of the of his investment advisory capacity. Business conducted is reviewed periodically jhh management to ensure any conflict of interest is addressed.

Any additional disclosable outside business activities can be found at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and are updated as required.

## ***Item 5 Additional Compensation***

Other than stated above, Peter has no other income or compensation to disclose.

## ***Item 6 Supervision***

David Jackson, III Compliance Advisor, Tamarah Taylor, is responsible for the compliance supervision of activities for all advisers and associates. They may be reached at 704-332-2032.

## ***Item 7 Requirements***

There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Bisulca. 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 in Item 3, there are no legal, civil or disciplinary events to disclose regarding Mr. Bisulca. Mr. Bisulca has not been the subject of any bankruptcy petition.

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**Jon Gauthier CFP®**

**CRD # 5397385**

**of**

**jhh wealth, llc**

**Main Office:**

330 E. Coffee Street

Suite 4011

Greenville, SC 29601

(704) 332-2032

This brochure supplement provides information about Jon Gauthier, and supplements the jhh wealth, llc (“jhh”) brochure. Please contact us at (704) 332-2032 if you have any questions about the contents of this supplement or jhh’s brochure. If you have not received jhh wealth llc’s brochure or if you have any questions about the contents of this supplement, you may also find information about jhh at [www.jhhwealth.com](http://www.jhhwealth.com).

Disclosure Information about the firm and associates may be obtained from your state’s division of securities upon request. Additional information about Mr. Gauthier and the firm is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ***Item 2 Educational Background & Business Experience***

Jon brings a wealth of experience to jhh. Over the last decade, Jon has worked for large brokerage firms providing comprehensive financial planning and investment services. He has been named a Five-Star Wealth Manager in Charlotte Magazine and a NABCAP Top-Scoring Wealth Manager in Charlotte, North Carolina. He is a CERTIFIED FINANCIAL PLANNER™ practitioner, a Chartered Retirement Planning Counselor® and an Accredited Portfolio Management Advisor®. He received his undergraduate degree in political science and Master of Public Policy from the University of Michigan.

\* *CERTIFIED FINANCIAL PLANNER™ (CFP®)* - This certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam (administered in 10 hours over a 2-day period) and agreeing to be bound by the CFP board's standard of professional conduct. As a prerequisite the IAR must have a bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full-time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the standards of professional conduct.

## ***Item 3 Disciplinary Information***

Advisers and associates are required to disclose any material facts regarding certain legal or disciplinary events information to report that would be material to your evaluation of an adviser. State and SEC registered advisers are also required to disclose all material facts regarding any event in which a supervised person of the firm was found liable in certain legal proceedings. There are no legal, civil, or disciplinary events to disclose regarding Mr. Gauthier. Mr. Gauthier 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. Gauthier. 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. Gauthier. However, we do encourage you to independently view the background of Mr. Gauthier on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

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

Mr. Gauthier has an association with Allen C. Ewing & Co., a registered broker dealer, member of FINRA/SIPC. Commissions received for registered broker dealer business is separate from any fees for RIA business. No compensation is received in addition to his salary and/or management fees with jhh. Business conducted through Allen C. Ewing & Co. is reviewed and approved by jhh management to ensure any conflict of interest is addressed.

Any additional disclosable outside business activities can be found at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and are updated as required.

## ***Item 5 Additional Compensation***

Other than stated above, Jon has no other income or compensation to disclose.

## ***Item 6 Supervision***

David Jackson, III Compliance Advisor, Tamarah Taylor, is responsible for the compliance supervision of activities for all advisers and associates. They may be reached at 704-332-2032.

## ***Item 7 Requirements***

There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Gauthier. 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 in Item 3, there are no legal, civil or disciplinary events to disclose regarding Mr. Gauthier. Mr. Gauthier has not been the subject of any bankruptcy petition.

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**Samuel Haskell CFA®**

**CRD # 2632749**

**of**

**jhh wealth, llc**

**Main Office:**

330 E. Coffee Street  
Suite 4011  
Greenville, SC 29601  
(704) 332-2032

This brochure supplement provides information about Samuel Haskell, and supplements the jhh wealth, llc (“jhh”) brochure. Please contact us at (704) 332-2032 if you have any questions about the contents of this supplement or jhh’s brochure. If you have not received jhh wealth llc’s brochure or if you have any questions about the contents of this supplement, you may also find information about jhh at [www.jhhwealth.com](http://www.jhhwealth.com).

Disclosure Information about the firm and associates may be obtained from your state’s division of securities upon request. Additional information about Mr. Haskell and the firm is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ***Item 2 Educational Background & Business Experience***

Sam Haskell began his investment career within the Morgan Stanley research group in 2000. He joined Sterne Agee in its Capital Markets group in 2002, transitioning into the family office in 2014. Prior to joining jhh, Haskell began the Colarion LLC registered investment advisory in 2016, managing broad investment portfolios with expertise in the financial services sector. In addition to Colarion, he is a board member for CommerceOne, a Birmingham commercial bank, and holds several real estate investments within SIPCO LLC. Sam holds 20 years of experience in the investment universe, including multiple financial crises. He is a CFA charter holder and graduate of Princeton University.

\* THE CHARTER FINANCIAL ANALYST® (“CFA®”) is a professional designation given by the CFA Institute that measures the competence and integrity of financial analysts. The CFA® Program is a graduate-level self-study program that combines a broad-based curriculum of investment principles with professional conduct requirements. Candidates are required to pass 3 levels of exams covering areas such as ethics, accounting, economics, money management and security analysis. Before a candidate is eligible to become a CFA charter holder, she must meet minimum experience requirements in the area of investment/financial practice. A candidate must hold a bachelor’s degree to enroll in the program.

## ***Item 3 Disciplinary Information***

Advisers and associates are required to disclose any material facts regarding certain legal or disciplinary events information to report that would be material to your evaluation of an adviser. State and SEC registered advisers are also required to disclose all material facts regarding any event in which a supervised person of the firm was found liable in certain legal proceedings. There are no legal, civil, or disciplinary events to disclose regarding Mr. Haskell. Mr. Haskell 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. Haskell. 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. Haskell. However, we do encourage you to independently view the background of Mr. Haskell on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

Any reportable events can be found at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Mr. Haskell operates his own state registered investment advisory firm, Colarion Partners. Fees received for Colarion Partner’s business is separate from any fees for jhh RIA business. No compensation is received in addition to his salary and/or management fees with jhh for jhh clients. Business conducted is reviewed periodically jhh management to ensure any conflict of interest is addressed. Mr. Haskell also has an association with the Mint Financial Sector Fund as the General Partner and Manager through Colarion Partners. Business conducted is reviewed periodically jhh management to ensure any conflict of interest is addressed.

Any additional disclosable outside business activities can be found at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and are updated as required.

## ***Item 5 Additional Compensation***

Other than stated above, Sam has no other income or compensation to disclose.

## ***Item 6 Supervision***

David Jackson, III Compliance Advisor, Tamarah Taylor, is responsible for the compliance supervision of activities for all advisers and associates. They may be reached at 704-332-2032.

## ***Item 7 Requirements***

There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Haskell. 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 in Item 3, there are no legal, civil or disciplinary events to disclose regarding Mr. Haskell. Mr. Haskell has not been the subject of any bankruptcy petition.

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**David Jackson, III CFP®**

**CRD # 7195542**

**of**

**jhh wealth, llc**

**Main Office:**

330 E. Coffee Street  
Suite 4011  
Greenville, SC 29601  
(704) 332-2032

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Disclosure Information about the firm and associates may be obtained from your state’s division of securities upon request. Additional information about Mr. Jackson and the firm is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## ***Item 2 Educational Background & Business Experience***

As a partner and wealth advisor, David closely advises clients on achieving their goals and priorities. He is a CERTIFIED FINANCIAL PLANNER™ practitioner and earned his CFP® marks through the Wake Forest University School of Business. Prior to joining jhh, David was a senior advisor for several members of the U.S. Congress. His issue portfolio included federal economic, energy, and financial services policy, as well as trade and international relations. He also served as press secretary and policy director for a U.S. Senate campaign. His career as a political advisor has transferred into the financial world as he continues to build and advise key client relationships on strategies to help them achieve their goals. David is a graduate of Wofford College and holds his Series 7 and Series 66 licenses. In his spare time, David volunteers as a baseball coach for Myers Park Trinity Little League.

\* **CERTIFIED FINANCIAL PLANNER™ (CFP®)** - This certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam (administered in 10 hours over a 2-day period) and agreeing to be bound by the CFP board's standard of professional conduct. As a prerequisite the IAR must have a bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full-time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the standards of professional conduct.

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

Mr. Jackson has an association with Allen C. Ewing & Co., a registered broker dealer, member of FINRA/SIPC. Commissions received for registered broker dealer business is separate from any fees for RIA business. No compensation is received in addition to his salary and/or management fees with jhh. Business conducted through Allen C. Ewing & Co. is reviewed and approved by jhh management to ensure any conflict of interest is addressed. Mr. Jackson also has an association with the Mint Financial Sector Fund as a partner and markets the fund as a registered representative of Allen C. Ewing & Co.. Business conducted is reviewed periodically jhh management to ensure any conflict of interest is addressed.

Any additional disclosable outside business activities can be found at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and are updated as required.

## ***Item 5 Additional Compensation***

Other than stated above, David has no other income or compensation to disclose.

***Item 6 Supervision***

David Jackson, III Compliance Advisor, Tamarah Taylor, is responsible for the compliance supervision of activities for all advisers and associates. They may be reached at 704-332-2032.

***Item 7 Requirements***

There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Jackson. 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 in Item 3, there are no legal, civil or disciplinary events to disclose regarding Mr. Jackson. Mr. Jackson has not been the subject of any bankruptcy petition.