



**O'Domhnaill Enterprises, Inc.**

**Does Business As**

**O'Donnell Wealth Management**

**627 Yellowstone Avenue**

**Cody, WY 82414**

**[www.odonnellwm.com](http://www.odonnellwm.com)**

**October 1, 2023**

**2B Brochure Supplement**

**Ryan M O'Donnell**

This brochure supplement provides information about Ryan O'Donnell that supplements our brochure. You should have received a copy of that brochure. Please contact Ryan O'Donnell if you did not receive O'Donnell Wealth Management ("OWM") brochure or if you have any questions about the contents of this supplement. Additional information about Ryan O'Donnell is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #7486624.

## ITEM 2 – EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

**Ryan M O'Donnell**

**Year of Birth:** 1989

**Educational Background:**

- Mount St. Mary's, Bachelor's Degree, Technology & Digital Media, 2015

**Business Background:**

- 10/2022 to Present LPL Financial, LLC, *Registered Representative*
- 03/2023 to Present O'Domhnaill Enterprises Inc. (DBA: O'Donnell Wealth Management), *Chief Information Security Officer, Financial Advisor*
- 06/2022 to 10/2022 Saxony Securities, Inc., *Associate Advisor*
- 12/2021 to 06/2022 O'Domhnaill Enterprises Inc. (DBA: O'Donnell Wealth Management), *Director of Technology, Administrative Associate*
- 08/2017 to 12/2021 West Park Hospital, *PC & Telecommunications Technician*
- 07/2016 to 08/2017 West Park Hospital, *Information Technology Help Desk Specialist*

**Exams, Licenses & Other Professional Designations:**

- 06/2022 Series 66 Uniform Combined State Law Examination
- 03/2023 Series 7 General Securities Representative Examination
- 02/2022 SIE Securities Industry Essentials Examination

## ITEM 3 – DISCIPLINARY INFORMATION

Ryan O'Donnell has no history of any legal or disciplinary events that deems to be material to a client's consideration of Ryan O'Donnell to act as their investment adviser representative. He has not been subject to any criminal actions, revocations, or suspensions. FINRA's BrokerCheck® is a resource available to review the disciplinary history of Ryan O'Donnell. <https://brokercheck.finra.org/>

## ITEM 4 – OTHER BUSINESS ACTIVITIES

Ryan O'Donnell is a Registered Representative of LPL Financial, LLC ("LPL") a securities broker/dealer, and a member of the Financial Industry Regulatory Authority, Inc. ("FINRA") and an investment adviser registered with the U.S Securities and Exchange Commission ("SEC").

As a broker-dealer, LPL engages in a broad range of activities normally associated with securities brokerage firms. Pursuant to the investment advice given by Ryan O'Donnell, investments in securities may be recommended for you. If LPL is selected as the broker-dealer, it will affect transactions in securities for you, a client of OWM and Ryan O'Donnell. By serving as the broker-dealer, LPL and Ryan O'Donnell will receive commissions for executing securities transactions.

You are advised that if LPL is selected as the broker-dealer, the transaction charges may be higher or lower than the charges you may pay if the transactions were executed at other broker-dealers. You should note, however, that clients always have the right to decide whether to purchase securities through Ryan O'Donnell, OWM or LPL.

Ryan O'Donnell may provide advice regarding investment company securities and mutual funds. You should be aware that, in addition to the advisory fees paid by you, each investment company also

charges its own separate investment advisory fees and other expenses (internal management fees). In addition, you should be aware that mutual funds may be purchased separately independent of the investment management services of OWM. Ryan O'Donnell does not have any relationship or arrangement with any issuer of securities.

Ryan O'Donnell in his capacity as a registered representative of receives commissions, 12(b) -1 fees, trails, or other compensation from the respective product sponsors and/or as a result of effecting securities transactions for you. However, you should note that clients have the right to decide whether to act on the recommendation to purchase any investment products through Ryan O'Donnell. He is able to offer a variety of advisory programs and services through LPL in addition to the advisory services he is able to offer through OWM.

#### **ITEM 5 – ADDITIONAL COMPENSATION**

Ryan O'Donnell does not receive any economic benefit for providing advisory services beyond the scope of O'Donnell Wealth Management and business activities listed in Item 4.

#### **ITEM 6 – SUPERVISION**

Ryan O'Donnell is supervised through a compliance program designed to prevent and detect violations of the federal and state securities laws. Supervision is conducted by the Chief Compliance Officer, Stephanie O'Donnell, who is responsible for administering the policies and procedures. As Chief Compliance Officer, Stephanie O'Donnell reviews those policies and procedures annually for their adequacy and the effectiveness of their implementation. All policies and procedures of the firm are followed.

Stephanie O'Donnell may be reached at 307-586-4279.

#### **ITEM 7: REQUIREMENTS FOR STATE-REGISTERED ADVISERS**

Ryan O'Donnell has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.