



**Part 2B of Form ADV: *Brochure Supplement***

Jeffery T. Albanese, CFP<sup>®</sup>, CIMA<sup>®</sup>

**BDO Wealth Advisors, LLC**

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02/24/2023

This brochure supplement provides information about Jeffery Albanese that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Jeffery Albanese is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Jeffery Albanese’s CRD# is 6674627.



**ITEM 2      EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Jeffery T. Albaneze

**Born:** 1991

**Education:**

- **Florida State University**  
Bachelor of Science (B.S.), Business Marketing and Professional Selling, 2014
  
- **Boston University**  
Completed graduate program in Financial Planning satisfying CFP Board education requirement, 2015
  
- **The Wharton School**  
Investment Management Certification Program, CIMA® Certification, 2018

**Business Experience**

- BDO Wealth Advisors, LLC; Senior Wealth Manager from 11/2020 to Present; Wealth Manager from 04/2017 – Present.
  
- LBA Wealth Management, LLC; Wealth Advisor/Paraplanner; 06/2014 to 05/2017

**Professional Designations:**

- **CERTIFIED FINANCIAL PLANNER™ professional**

Jeffery Albaneze is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”) and is a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional.\*

\*Minimum Qualifications to be a CFP® professional: Bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® Certification Exam, candidates must also complete qualifying work experience and agree to be bound by the CFP Board’s *Code of Ethics and Standards of Conduct*, which sets forth the ethical and practice standards for CFP® professionals. To remain certified, certificants must commit to complying with the CFP Board’s *Code and Standards* and complete 30 hours of continuing education every two years.

- **Certified Investment Management Analyst® designation (CIMA®)**

\*Minimum Qualifications for a Certified Investment Management Analyst® designation (CIMA®) The CIMA designation reflects completion and adherence to the “four E’s”: experience, education, examination and ethics. An investment consultant who has earned the CIMA designation has at least three years of broad experience in the field of investment management consulting, has passed an extensive background check, and has completed the demanding educational program.



**Professional Designations (cont.):**

Successful completion of a comprehensive examination is the final step in receiving the designation. To maintain their designation, CIMA® professionals must continually adhere to a rigorous [Code of Professional Responsibility](#) and complete 40 hours of continuing education every two years.

**ITEM 3      DISCIPLINARY INFORMATION**

Jeff has no history of any disciplinary events.

**ITEM 4      OTHER BUSINESS ACTIVITIES**

Jeff is not engaged in any other business activities..

**ITEM 5      ADDITIONAL COMPENSATION**

Jeff does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6      SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements.

Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Jeffery Albaneze. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

Mark D. Biegel, Esquire, CPA

**BDO Wealth Advisors, LLC**

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02/24/2023

This brochure supplement provides information about Mark Biegel that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Mark Biegel is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Mark Biegel’s CRD# is 3070942.



**ITEM 2      EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Mark D. Biegel

**Born:** 1967

**Education:**

- J.D., University of Baltimore School of Law
- B.S., University of Maryland College Park, Cum Laude

**Business Experience**

- BDO Wealth Advisors, LLC; Partner; 12/2020 to Present
- BDO USA, LLP; Partner; 01/2020 to Present
- Biegel & Waller LLC; Managing Member; 09/2000 to 01/2020
- Biegel & Waller LLP, Partner; 02/1998 to 01/2020

**Professional Designations:**

- Certified Public Accountant (CPA)

Minimum Qualifications to be a CPA: All CPA candidates must pass the Uniform CPA Examination to qualify for the CPA designation and license to practice public accounting. Eligibility to sit for the Uniform CPA Exam is typically a bachelor's degree with a focus in accounting and business administration and an additional 1 year of study.

**ITEM 3      DISCIPLINARY INFORMATION**

Mark has no history of any disciplinary events.

**ITEM 4      OTHER BUSINESS ACTIVITIES**

Mark is a Partner of BDO USA, LLP, a national tax, assurance, business advisory and consulting firm providing a wide range of services to individuals and business clients.

**ITEM 5      ADDITIONAL COMPENSATION**

Mark Biegel does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6      SUPERVISION**

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Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Mark Biegel. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

Dorothy E. Bossung, CFP<sup>®</sup>, CIMA<sup>®</sup>, CPWA<sup>®</sup>, RMA<sup>®</sup>

**BDO Wealth Advisors, LLC**

Tampa, Florida Office

501 E. Kennedy Blvd., Suite 910  
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02/24/2023

This brochure supplement provides information about Dorothy Bossung that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Dorothy Bossung is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Dorothy Bossung’s CRD# is 865502.



## **ITEM 2      EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Dorothy E. Bossung

**Born:** 1955

### **Education:**

- **Pace University**  
B.B.A., Accounting, *cum laude*

### **Business Experience**

- BDO Wealth Advisors, LLC; Senior Consultant; 10/2021 to Present
- Lowery Asset Consulting, LLC; Executive Vice President; 07/2009 to 10/2021

### **Professional Designations:**

- **CERTIFIED FINANCIAL PLANNER™ professional**

Dorothy Bossung is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”) and is a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional.\*

\*Minimum Qualifications to be a CFP® professional: Bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® Certification Exam, candidates must also complete qualifying work experience and agree to be bound by the CFP Board’s *Code of Ethics and Standards of Conduct*, which sets forth the ethical and practice standards for CFP® professionals. To remain certified, certificants must commit to complying with the CFP Board’s *Code and Standards* and complete 30 hours of continuing education every two years.

- **Certified Investment Management Analyst® designation (CIMA®)**

\*Minimum Qualifications for a Certified Investment Management Analyst® designation (CIMA®) The CIMA designation reflects completion and adherence to the “four E’s”: experience, education, examination and ethics. An investment consultant who has earned the CIMA designation has at least three years of broad experience in the field of investment management consulting, has passed an extensive background check, and has completed the demanding educational program. Successful completion of a comprehensive examination is the final step in receiving the designation. To maintain their designation, CIMA® professionals must continually adhere to a rigorous [\*Code of Professional Responsibility\*](#) and complete 40 hours of continuing education every two years.

- **Certified Private Wealth Advisor (CPWA®)**

The CPWA® is awarded by the Investments & Wealth Institute®. Candidates must have a Bachelor’s degree from an accredited college or university or one of the following designations or licenses:



CIMA, CIMA, CFA, CFP, ChFC, or CPA; a satisfactory record of ethical conduct, as determined by IMCA’s Admissions Committee; five (5) years of professional client-centered experience in financial services or a related industry. Candidates must complete a 6 month pre-study educational component and must pass a final examination. To retain the CPWA designation, certificants must completed 40 hours of continuing education every 2 years.

- **Retirement Management Advisor (RMA®)**

The RMA® designation is awarded by the Investments & Wealth Institute®. Candidates must have three years relevant experience or one of the following designations or licenses: CIMA, CPWA®, CFA®, CFP®, ChFC®, or CPA; and adhere to the Institute’s Code of Professional Responsibility. Candidates must complete the RMA online course, the two-day RMA Education Capstone education event and pass the Retirement Management Advisor Exam. RMA® certified professionals are required to complete and report a minimum of 40 credit hours of continuing education within a 2-year period.

**ITEM 3**      **DISCIPLINARY INFORMATION**

Dorothy has no history of any material disciplinary events within the past ten years.

**ITEM 4**      **OTHER BUSINESS ACTIVITIES**

Dorothy is not involved with any other business activities.

**ITEM 5**      **ADDITIONAL COMPENSATION**

Dorothy does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6**      **SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements.

Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Dorothy Bossung. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).





**Part 2B of Form ADV: *Brochure Supplement***

Matt Cochran, CFA®

**BDO Wealth Advisors, LLC**

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Web Address: [www.BDO.com/Wealthadvisors](http://www.BDO.com/Wealthadvisors)

02/24/2023

This brochure supplement provides information about Matt Cochran that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Matt Cochran is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Matt Cochran’s CRD# is 5007977.



**ITEM 2 EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Matthew Boyd Cochran

**Born:** 1981

**Education**

- **Appalachian State University**  
B.S., Finance & Banking

**Business Experience**

- BDO Wealth Advisors, LLC; Managing Director/Investment Adviser Representative; 04/2017 to Present
- LBA Wealth Management; Portfolio Manager; 01/2011 to 05/2017
- Merrill Lynch; Investor Service Advisor; 06/2009 to 01/2011
- The 360 Group, LLC; Owner; 03/2008 to 05/2009
- Banc of America Investment Services, Inc.; Investment Specialist; 09/2006 to 04/2008

**Professional Designations & Licenses**

- **Chartered Financial Analyst (CFA®)**  
The CFA designation is granted by the CFA Institute. To obtain the CFA charter, candidates must have earned a bachelor's degree from a university or have a combined 4000 hours of professional work and university experience, complete over 900 hours of self study, successfully pass three six-hour exams, and accrue at least three or 4000 hours of work experience in the investment decision-making process. In meeting these requirements, a CFA charter holder demonstrates their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.

**ITEM 3 DISCIPLINARY INFORMATION**

Matt has no history of any disciplinary events.

**ITEM 4 OTHER BUSINESS ACTIVITIES**

Matt is not engaged in any other business activities.

**ITEM 5 ADDITIONAL COMPENSATION**

Matt does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6 SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements.

Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Matt Cochran. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

Trevor Emery, CIMA®

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02/24/2023

This brochure supplement provides information about Trevor Emery that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Trevor Emery is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Trevor Emery’s CRD# is 2578153.



**ITEM 2      EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Trevor J. Emery

**Born:** 1971

**Education:**

- **Colorado State University**  
Bachelor of Science, Business Administration

**Business Experience**

- BDO Wealth Advisors, LLC; Director/Investment Adviser Representative; 12/2020 to Present
- Cosyntris Advisory Network, LLC; Owner; 08/2012 to 12/2020
- Wells Fargo Advisors Financial Network, LLC; Registered Representative; 05/2009 to 09/2012
- Wealth Strategy Partners; Owner; 11/2007 to 08/2012

**Professional Designations:**

- **Certified Investment Management Analyst® designation (CIMA®)**  
The Wharton School, The University of Pennsylvania, Philadelphia, Pennsylvania

\*Minimum Qualifications for a Certified Investment Management Analyst® designation (CIMA®)  
The CIMA designation reflects completion and adherence to the “four E’s”: experience, education, examination and ethics. An investment consultant who has earned the CIMA designation has at least three years of broad experience in the field of investment management consulting, has passed an extensive background check, and has completed the demanding educational program. Successful completion of a comprehensive examination is the final step in receiving the designation. To maintain their designation, CIMA® professionals must continually adhere to a rigorous [Code of Professional Responsibility](#) and complete 40 hours of continuing education every two years.

**ITEM 3      DISCIPLINARY INFORMATION**

Trevor has no history of any disciplinary events.

**ITEM 4      OTHER BUSINESS ACTIVITIES**

Trevor is not engaged in any other business activities.

**ITEM 5      ADDITIONAL COMPENSATION**

Trevor does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6      SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer



those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements.

Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Trevor Emery. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

Robert Filosa, CFA®

**BDO Wealth Advisors, LLC**

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02/24/2023

This brochure supplement provides information about Robert Filosa that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Robert Filosa is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Robert Filosa’s CRD# is 7160306.



**ITEM 2 EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Robert E. Filosa

**Born:** 1985

**Education**

- **The Johns Hopkins University Carey Business School**  
Master of Business Administration (M.B.A.), Finance, 2015
- **United States Naval Academy**  
Bachelor of Science (B.S.), History, 2007

**Business Experience**

- BDO Wealth Advisors, LLC; Director, Portfolio Management; 05/2019 to Present
- Cambridge Associates; Investment Analyst; 10/2017 to 04/2019
- United States Navy; Lieutenant; 05/2007 to 10/2017

**Professional Designations & Licenses**

- **Chartered Financial Analyst (CFA®)**  
The CFA designation is granted by the CFA Institute. To obtain the CFA charter, candidates must have earned a bachelor's degree from a university or have a combined 4000 hours of professional work and university experience, complete over 900 hours of self study, successfully pass three six-hour exams, and accrue at least three or 4000 hours of work experience in the investment decision-making process. In meeting these requirements, a CFA charter holder demonstrates their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.

**ITEM 3 DISCIPLINARY INFORMATION**

Rob has no history of any disciplinary events.

**ITEM 4 OTHER BUSINESS ACTIVITIES**

Rob is not engaged in any other business activities.

**ITEM 5 ADDITIONAL COMPENSATION**

Rob does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6 SUPERVISION**

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Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Robert Filosa. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

Matthew Gotlin, CFA®

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02/24/2023

This brochure supplement provides information about Matthew Gotlin that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Matthew Gotlin is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Matthew Gotlin’s CRD# is 2498059.





**ITEM 2      EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Matthew A. Gotlin

**Born:** 1974

**Education:**

- **The Wharton School at the University of Pennsylvania**  
Master of Business Administration (M.B.A.), 2008
- **Duke University**  
Bachelor of Arts degree (AB), Public Policy, 1996

**Business Experience**

- BDO Wealth Advisors, LLC; Wealth Advisory Managing Director; 01/2020 to Present
- Biegel & Waller LLC; Director of Research; 01/2009 to 01/2020
- March Capital; Partner; 12/2006 to 12/2008

**Professional Designations:**

- **Chartered Financial Analyst (CFA®)**  
The CFA designation is granted by the CFA Institute. To obtain the CFA charter, candidates must have earned a bachelor’s degree from a university or have a combined 4000 hours of professional work and university experience, complete over 900 hours of self study, successfully pass three six-hour exams, and accrue at least three or 4000 hours of work experience in the investment decision-making process. In meeting these requirements, a CFA charter holder demonstrates their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.

**ITEM 3      DISCIPLINARY INFORMATION**

Matt has no history of any disciplinary events.

**ITEM 4      OTHER BUSINESS ACTIVITIES**

Matt is not engaged in any other business activities.

**ITEM 5      ADDITIONAL COMPENSATION**

Matt does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6      SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements. Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Matthew Gotlin. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

April Hayden, CFP®

**BDO Wealth Advisors, LLC**

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02/24/2023

This brochure supplement provides information about April Hayden that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about April Hayden is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. April Hayden’s CRD# is 7644925.



**ITEM 2 EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** April Louise Hayden

**Born:** 1989

**Education**

- **University of Arizona**  
Master of Arts, 2013
- **South Dakota State University**  
Bachelor of Arts, 2011

**Business Experience**

- BDO Wealth Advisors, LLC; Wealth Manager, 08/2022 to Present; Operations Manager, 08/2021 to 07/2022; Sr. Customer Service Associate, CSA, 06/2018 to 07/2021.
- Operation New Uniform; Director of Development; 09/2016 to 05/2018.
- University of California; Archives and Manuscript Assistant; 03/2015 to 06/2016

**Professional Designations & Licenses**

- **CERTIFIED FINANCIAL PLANNER™ professional, 2021**

April Hayden is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”) and is a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional.\*

\*Minimum Qualifications to be a CFP® professional: Bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® Certification Exam, candidates must also complete qualifying work experience and agree to be bound by the CFP Board’s *Code of Ethics and Standards of Conduct*, which sets forth the ethical and practice standards for CFP® professionals. To remain certified, certificants must commit to complying with the CFP Board’s *Code and Standards* and complete 30 hours of continuing education every two years.

**ITEM 3 DISCIPLINARY INFORMATION**

April Hayden has no history of any disciplinary events.

**ITEM 4 OTHER BUSINESS ACTIVITIES**

April Hayden is not engaged in any non-investment-related activities.

**ITEM 5 ADDITIONAL COMPENSATION**

April Hayden does not receive any economic benefit from a non-advisory client for the provision of advisory services.



**ITEM 6 SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements.

Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Ms. Hayden. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

Peter Jenkins, CFP®

**BDO Wealth Advisors, LLC**

Columbia, Maryland Office

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02/24/2023

This brochure supplement provides information about Peter Jenkins that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Peter Jenkins is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Peter Jenkins’s CRD# is 2443917.



**ITEM 2      EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Peter P. Jenkins

**Born:** 1963

**Education:**

- **Sellinger School of Business, Loyola University**  
Master of Business Administration (M.B.A.), Finance, 1990
- **Lerner School of Business, University of Delaware**  
Bachelor of Science (B.S.), Business, 1985

**Business Experience**

- BDO Wealth Advisors, LLC; Wealth Advisory Director; 01/2020 to Present
- Biegel & Waller LLC; Partner; 12/2009 to 01/2020
- Credit Suisse Securities (USA) LLC; Director; 01/2003 to 11/2009

**Professional Designations:**

- **CERTIFIED FINANCIAL PLANNER™ professional, 2015**

Peter Jenkins is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”) and is a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional.\*

\*Minimum Qualifications to be a CFP® professional: Bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® Certification Exam, candidates must also complete qualifying work experience and agree to be bound by the CFP Board’s *Code of Ethics and Standards of Conduct*, which sets forth the ethical and practice standards for CFP® professionals. To remain certified, certificants must commit to complying with the CFP Board’s *Code and Standards* and complete 30 hours of continuing education every two years.

**ITEM 3      DISCIPLINARY INFORMATION**

Peter has no history of any disciplinary events.

**ITEM 4      OTHER BUSINESS ACTIVITIES**

Peter is not engaged in any other business activities.

**ITEM 5      ADDITIONAL COMPENSATION**

Peter does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6      SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least



annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements. Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Peter Jenkins. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

David Juzwiak, CFA®

**BDO Wealth Advisors, LLC**

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02/24/2023

This brochure supplement provides information about David Juzwiak that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about David Juzwiak is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. David Juzwiak’s CRD# is 5784626.





**ITEM 2 EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** David R. Juzwiak

**Born:** 1984

**Education**

- **Aquinas College, Grand Rapids, MI**  
B.S. in Business Administration, 2007  
B.S. in Accounting

**Business Experience**

- BDO Wealth Advisors, LLC; Senior Consultant; 10/2021 to Present
- Lowery Asset Consulting; Senior Consultant; 10/2012 to 10/2021
- The Rehmann Group; Analyst; 10/2007 to 10/2012

**Professional Designations**

- **Chartered Financial Analyst (CFA®)**  
The CFA designation is granted by the CFA Institute. To obtain the CFA charter, candidates must have earned a bachelor's degree from a university or have a combined 4000 hours of professional work and university experience, complete over 900 hours of self study, successfully pass three six-hour exams, and accrue at least three or 4000 hours of work experience in the investment decision-making process. In meeting these requirements, a CFA charter holder demonstrates their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.

**ITEM 3 DISCIPLINARY INFORMATION**

David has no history of any disciplinary events.

**ITEM 4 OTHER BUSINESS ACTIVITIES**

David is not engaged in any non-investment related activities.

**ITEM 5 ADDITIONAL COMPENSATION**

David does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6 SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements.



**BDO WEALTH ADVISORS, LLC**

Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of David Juzwiak. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

Richard Kraner, JD, CPA, CFP®, PFS, CIMA®

**BDO Wealth Advisors, LLC**

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Web Address: [www.BDO.com/Wealthadvisors](http://www.BDO.com/Wealthadvisors)

02/24/2023

This brochure supplement provides information about Richard Kraner that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Richard Kraner is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Richard Kraner’s CRD# is 2719261.



**ITEM 2      EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Richard F. Kraner

**Born:** 1955

**Education:**

- **St. Louis University School of Law**  
Juris Doctor, St. Louis University School of Law
- **St. Louis University**  
B.S., Business Administration

**Business Experience**

- BDO Wealth Advisors, LLC; Wealth Advisory Partner; 06/2015 to Present
- BDO USA, LLP; Partner and CPA; 06/2015 to Present
- Stone Carlie Wealth Advisors, LLC; Member; 12/2002 to 08/2015
- Stone Carlie & Company, LLC; Member & CPA; 12/2002 to 06/ 2015

**Professional Designations:**

- **Certified Public Accountant (CPA)**  
Minimum Qualifications to be a CPA: All CPA candidates must pass the Uniform CPA Examination to qualify for the CPA designation and license to practice public accounting. Eligibility to sit for the Uniform CPA Exam is typically a bachelor's degree with a focus in accounting and business administration and an additional 1 year of study.
- **Personal Financial Specialist (PFS)**  
The PFS designation is awarded by the American Institute of Certified Public Accountants (AICPA) to those who have taken additional training and already have a CPA designation. Every PFS credential holder is a licensed CPA and a member in good standing in the AICPA; has met strict education and eligible business experience requirements, including two (2) years of full time business or teaching experience in personal financial planning and has agreed to the AICPA Code of Professional Conduct.
- **CERTIFIED FINANCIAL PLANNER™ professional**  
Richard Kraner is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board") and is a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional. \*Minimum Qualifications to be a CFP® professional: Bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® Certification Exam, candidates must also complete qualifying work experience and agree to be bound by the CFP Board's *Code of Ethics and Standards of Conduct*, which sets forth the ethical and practice standards for CFP® professionals. To remain certified, certificants must commit to complying with the CFP Board's *Code and Standards* and complete 30 hours of continuing education every two years.

- **Certified Investment Management Analyst® designation (CIMA®)**

\*Minimum Qualifications for a Certified Investment Management Analyst® designation (CIMA®)

The CIMA designation reflects completion and adherence to the “four E’s”: experience, education, examination and ethics. An investment consultant who has earned the CIMA designation has at least three years of broad experience in the field of investment management consulting, has passed an extensive background check, and has completed the demanding educational program.

Successful completion of a comprehensive examination is the final step in receiving the designation. To maintain their designation, CIMA® professionals must continually adhere to a rigorous [Code of Professional Responsibility](#) and complete 40 hours of continuing education every two years.

- Insurance Licenses in Accident and Health or Sickness; Life

### **ITEM 3      DISCIPLINARY INFORMATION**

Richard has no history of any disciplinary events.

### **ITEM 4      OTHER BUSINESS ACTIVITIES**

Richard is a Partner and CPA for BDO USA, LLP, a national tax, assurance, business advisory and consulting firm providing a wide range of services to individuals and business clients.

Richard holds an insurance license to sell insurance products; as such, he may receive compensation from the sale of health insurance or non-variable life insurance products. This creates a potential conflict of interest, which is mitigated in the following ways: clients of BDOWA are under no obligation to purchase insurance products, advisory fees are not charged upon the values of these products, and this activity represents less than 10% of his time and income. Richard is not active in a sales capacity for new insurance products or insurance clients.

### **ITEM 5      ADDITIONAL COMPENSATION**

Richard does not receive any economic benefit from a non-advisory client for the provision of advisory services.

### **ITEM 6      SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements.

Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Richard Kraner. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

Micah J. Lang, CFP<sup>®</sup>, CIMA<sup>®</sup>

**BDO Wealth Advisors, LLC**

Denver, Colorado Office

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Denver, CO 80203

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02/24/2023

This brochure supplement provides information about Micah Lang that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Micah Lang is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Micah Lang’s CRD# is 2851307.



**ITEM 2 EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Micah J. Lang

**Born:** 1974

**Education:**

- **Gonzaga University, Spokane, WA**  
Bachelor of Business Administration in Finance, Economics, and Management Information Systems

**Business Experience**

- BDO Wealth Advisors, LLC; Director and Investment Adviser Representative from 12/1/2020 to Present
- Purshe Kaplan Sterling Investments, LLC, Registered Representative, 09/2012 to present
- Cosyntris Advisory Network, LLC, Managing Director, 08/2012 to 11/30/2020
- Wachovia Securities Financial Network, LLC and Wells Fargo Advisors Financial Network, LLC  
Registered Representative, 11/2007 to 09/2012
- Smith Barney Inc., Registered Representative, 12/1996 to 11/2007

**Professional Designations:**

- **CERTIFIED FINANCIAL PLANNER™ professional**  
College for Financial Planning (Denver, CO), 2001

Micah Lang is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”) and is a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional.\*

\*Minimum Qualifications to be a CFP® professional: Bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® Certification Exam, candidates must also complete qualifying work experience and agree to be bound by the CFP Board’s *Code of Ethics and Standards of Conduct*, which sets forth the ethical and practice standards for CFP® professionals. To remain certified, certificants must commit to complying with the CFP Board’s *Code and Standards* and complete 30 hours of continuing education every two years.

- **Certified Investment Management Analyst® designation (CIMA®)**  
Investment Management Consultants Association (IMCA) program, Denver, Colorado, 2012  
The Wharton School, The University of Pennsylvania, Philadelphia, Pennsylvania, 2011

\*\*Minimum Qualifications for a Certified Investment Management Analyst® designation (CIMA®)  
The CIMA designation reflects completion and adherence to the “four E’s”: experience, education, examination and ethics. An investment consultant who has earned the CIMA designation has at least three years of broad experience in the field of investment management consulting, has passed an extensive background check, and has completed the demanding educational program.

**Professional Designations (cont.):**

Successful completion of a comprehensive examination is the final step in receiving the designation. To maintain their designation, CIMA® professionals must continually adhere to a rigorous [Code of Professional Responsibility](#) and complete 40 hours of continuing education every two years.

- Insurance Licenses in Annuities, Life, Health and Long-Term Care

**ITEM 3      DISCIPLINARY INFORMATION**

Micah has no history of any disciplinary events.

**ITEM 4      OTHER BUSINESS ACTIVITIES****Investment-Related Activities:**

Micah is a registered representative of Purshe Kaplan Sterling Investments, LLC (“PKS”), a securities broker/dealer and a member of the Financial Industry Regulatory Authority, Inc. (“FINRA”). His registration is maintained in order to allow him to receive compensation derived from sales of securities and variable products that occurred before he joined BDOWA. He does not currently engage in the sale of securities or variable investment products through PKS.

Micah holds an insurance license to sell insurance products; as such, he may receive compensation from the sale of health insurance or non-variable life insurance products. This creates a potential conflict of interest, which is mitigated in the following ways: clients of BDOWA are under no obligation to purchase insurance products, advisory fees are not charged upon the values of these products, and this activity represents less than 10% of his time and income.

**Non-Investment Related Activities:**

Micah is not engaged in any non-investment related business activities that involve a substantial amount of time or provide a substantial source of income.

**ITEM 5      ADDITIONAL COMPENSATION**

Apart from the existing Purshe Kaplan Sterling Investments, LLC (“PKS”) business, Micah Lang does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6      SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements.

Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Micah Lang. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).





**Part 2B of Form ADV: *Brochure Supplement***

William G. Lowery

**BDO Wealth Advisors, LLC**

Chicago, Illinois Office

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Web Address: [www.BDO.com/Wealthadvisors](http://www.BDO.com/Wealthadvisors)

02/24/2023

This brochure supplement provides information about William Lowery that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about William Lowery is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. William Lowery’s CRD# is 1289599.



**ITEM 2 EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** William G. Lowery

**Born:** 1952

**Education**

- **University of Missouri**  
B.S., Business

**Securities Industry Examinations**

- Series 65, Uniform Investment Adviser Law Examination, 2022

**Business Experience**

- BDO Wealth Advisors, LLC; Wealth Advisory Managing Director; 10/2021 to Present
- Lowery Asset Consulting, LLC; CEO/Member; 10/2002 to 10/2021

**ITEM 3 DISCIPLINARY INFORMATION**

Bill has no history of any disciplinary events.

**ITEM 4 OTHER BUSINESS ACTIVITIES**

Bill is not engaged in any other business activities.

**ITEM 5 ADDITIONAL COMPENSATION**

Bill does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6 SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements.

Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of William Lowery. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

Michael Lynch, CFA<sup>®</sup>, CFP<sup>®</sup>

**BDO Wealth Advisors, LLC**

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02/24/2023

This brochure supplement provides information about Michael Lynch that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Michael Lynch is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Michael Lynch’s CRD# is 3093476.



**ITEM 2 EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Michael J. Lynch

**Born:** 1976

**Education**

- **University of Scranton**  
B.S., Finance

**Business Experience**

- BDO Wealth Advisors, LLC; Director/Investment Committee Chairperson; 12/2018 to Present
- OT: Optimized Transitions, Independent Investment Counsel, LLC; 06/2015 to 12/2018
- Twenty-First Securities Corporation; 09/2004 to 11/2015

**Professional Designations**

- **Chartered Financial Analyst (CFA®)**  
The CFA designation is granted by the CFA Institute. To obtain the CFA charter, candidates must have earned a bachelor's degree from a university or have a combined 4000 hours of professional work and university experience, complete over 900 hours of self study, successfully pass three six-hour exams, and accrue at least three or 4000 hours of work experience in the investment decision-making process. In meeting these requirements, a CFA charter holder demonstrates their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.
- **CERTIFIED FINANCIAL PLANNER™ professional**  
Michael Lynch is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board") and is a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional.\*  
  
\*Minimum Qualifications to be a CFP® professional: Bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® Certification Exam, candidates must also complete qualifying work experience and agree to be bound by the CFP Board's *Code of Ethics and Standards of Conduct*, which sets forth the ethical and practice standards for CFP® professionals. To remain certified, certificants must commit to complying with the CFP Board's *Code and Standards* and complete 30 hours of continuing education every two years.

**ITEM 3 DISCIPLINARY INFORMATION**

Michael has no history of any disciplinary events.

**ITEM 4 OTHER BUSINESS ACTIVITIES**

Michael is not engaged in any other business activities.



**ITEM 5    ADDITIONAL COMPENSATION**

Michael does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6    SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements.

Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Michael Lynch. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

Zachary Pearsall

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Web Address: [www.BDO.com/Wealthadvisors](http://www.BDO.com/Wealthadvisors)

02/24/2023

This brochure supplement provides information about Zachary Pearsall that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Zachary Pearsall is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Zachary Pearsall’s CRD# is 7658823.



**ITEM 2 EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Zachary Thomas Pearsall

**Born:** 1991

**Education**

- **University of Illinois at Urbana-Champaign**  
B.A. in Economics, 2014

**Securities Industry Examinations**

- Series 65, Uniform Investment Adviser Law Examination, 2022

**Business Experience**

- BDO Wealth Advisors, LLC; Consultant; 08/2022 to Present
- Taiber Kosmala & Associates; Analyst; 08/2014 to 05/2022

**ITEM 3 DISCIPLINARY INFORMATION**

Zach has no history of any disciplinary events.

**ITEM 4 OTHER BUSINESS ACTIVITIES**

Zach is not engaged in any non-investment-related activities.

**ITEM 5 ADDITIONAL COMPENSATION**

Zach does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6 SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements.

Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Zach Pearsall. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

Anne Phelps, CPA, CIMA®

**BDO Wealth Advisors, LLC**

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Web Address: [www.BDO.com/Wealthadvisors](http://www.BDO.com/Wealthadvisors)

02/24/2023

This brochure supplement provides information about Anne Phelps that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Anne Phelps is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Anne Phelps’s CRD# is 5863321.





**ITEM 2 EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Anne M. Phelps

**Born:** 1981

**Education:**

- **University of Missouri**  
Master of Accountancy (M.Acc.)
- **University of Missouri**  
B.S., Accounting

**Business Experience**

- BDO Wealth Advisors, LLC; Director; 08/2015 to Present
- BDO USA, LLP; Senior Manager; 08/2015 to Present
- Stone Carlie Wealth Advisors, LLC; Supervisor & Investment Adviser Representative; 12/2010 to 08/2015
- Stone Carlie & Company, LLC; Manager & Tax Accountant; 10/2009 to 08/2015
- PricewaterhouseCoopers; Senior Associate; 08/2005 to 10/2009

**Professional Designations:**

- **Certified Public Accountant (CPA)**  
Minimum Qualifications to be a CPA: All CPA candidates must pass the Uniform CPA Examination to qualify for the CPA designation and license to practice public accounting. Eligibility to sit for the Uniform CPA Exam is typically a bachelor’s degree with a focus in accounting and business administration and an additional 1 year of study.
- **Certified Investment Management Analyst® designation (CIMA®)**  
\*Minimum Qualifications for a Certified Investment Management Analyst® designation (CIMA®)  
The CIMA designation reflects completion and adherence to the “four E’s”: experience, education, examination and ethics. An investment consultant who has earned the CIMA designation has at least three years of broad experience in the field of investment management consulting, has passed an extensive background check, and has completed the demanding educational program. Successful completion of a comprehensive examination is the final step in receiving the designation. To maintain their designation, CIMA® professionals must continually adhere to a rigorous [Code of Professional Responsibility](#) and complete 40 hours of continuing education every two years.

**ITEM 3 DISCIPLINARY INFORMATION**

Anne has no history of any disciplinary events.

**ITEM 4 OTHER BUSINESS ACTIVITIES**

Anne is a Tax Accountant for BDO USA, LLP, a national tax, assurance, business advisory and consulting firm providing a wide range of services to individuals and business clients.



**ITEM 5**      **ADDITIONAL COMPENSATION**

Anne does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6**      **SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements.

Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Anne Phelps. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

Kaitlyn Weatherly, CFP®

**BDO Wealth Advisors, LLC**

1301 Riverplace Blvd., Suite 900  
Jacksonville, FL 32202

Telephone: 904-394-0837

Email: [kweatherly@bdowealth.com](mailto:kweatherly@bdowealth.com)

Web Address: [www.BDO.com/Wealthadvisors](http://www.BDO.com/Wealthadvisors)

02/24/2023

This brochure supplement provides information about Kaitlyn Weatherly that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Kaitlyn Weatherly is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Kaitlyn Weatherly’s CRD# is 6302851.



**ITEM 2 EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Kaitlyn P. Weatherly

**Born:** 1985

**Education**

- **Tulane University - A. B. Freeman School of Business**  
M.S., Finance
- **Tulane University - A. B. Freeman School of Business**  
B.S.M., Finance

**Business Experience**

- BDO Wealth Advisors, LLC; Wealth Advisory Managing Director; 04/2017 to Present
- LBA Wealth Management; Wealth Advisor; 02/2014 to 05/2017
- Citicorp; International Investment Officer; 11/2010 to 02/2014
- U. S. Bank; Portfolio Manager; 02/2009 to 11/2010

**Professional Designations & Licenses**

- **CERTIFIED FINANCIAL PLANNER™ professional**

Kaitlyn Weatherly is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”) and is a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional.\*

\*Minimum Qualifications to be a CFP® professional: Bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® Certification Exam, candidates must also complete qualifying work experience and agree to be bound by the CFP Board’s *Code of Ethics and Standards of Conduct*, which sets forth the ethical and practice standards for CFP® professionals. To remain certified, certificants must commit to complying with the CFP Board’s *Code and Standards* and complete 30 hours of continuing education every two years.

**ITEM 3 DISCIPLINARY INFORMATION**

Kaitlyn has no history of any disciplinary events.

**ITEM 4 OTHER BUSINESS ACTIVITIES**

Kaitlyn is not engaged in any other business activities.

**ITEM 5 ADDITIONAL COMPENSATION**

Kaitlyn does not receive any economic benefit from a non-advisory client for the provision of advisory services.

**ITEM 6 SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew



Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements.

Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Kaitlyn Weatherly. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).



**Part 2B of Form ADV: *Brochure Supplement***

Christopher G. Widing, CFP®

**BDO Wealth Advisors, LLC**

**Fort Lauderdale, Florida Office**

515 E. Las Olas Blvd., 5<sup>th</sup> Floor  
Fort Lauderdale, FL 33301

Telephone: 954-626-2949

Email: [kwiding@bdowealth.com](mailto:kwiding@bdowealth.com)

Web Address: [www.BDO.com/Wealthadvisors](http://www.BDO.com/Wealthadvisors)

02/24/2023

This brochure supplement provides information about Kip Widing that supplements the BDO Wealth Advisors, LLC (“BDOWA”) brochure. You should have received a copy of that brochure. Please contact Matthew Murray, CCO, at 904.394.0838 or [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com) if you did not receive BDO Wealth Advisors, LLC’s brochure or if you have any questions about the contents of this supplement.

Additional information about Kip Widing is also available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. Kip Widing’s CRD# is 3121011.



**ITEM 2 EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

**Full Legal Name:** Christopher G. Widing

**Born:** 1977

**Education**

- **Ohio State University (Max M. Fisher College of Business)**  
M.B.A.
- **Ohio University, College of Business**  
B.B.A., Finance
- **Ohio University, College of Communication**  
B.S., Organizational Communication

**Business Experience**

- BDO Wealth Advisors, LLC; Wealth Advisory Director; 08/2016 to Present
- GSK Wealth Advisors, Inc.; Investment Adviser Representative; 08/2014 to 08/2016
- Wells Fargo Advisors LLC; Financial Consultant, Branch Liaison; 06/2006 to 06/2014
- McDonalds Investments; Financial Advisor; 01/2001 to 06/2006
- First Union Securities; Financial Advisor Trainee; 06/2000 to 01/2001

**Professional Designations & Licenses**

- **CERTIFIED FINANCIAL PLANNER™ professional**

Kip Widing is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board") and is a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional.\*

\*Minimum Qualifications to be a CFP® professional: Bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® Certification Exam, candidates must also complete qualifying work experience and agree to be bound by the CFP Board's *Code of Ethics and Standards of Conduct*, which sets forth the ethical and practice standards for CFP® professionals. To remain certified, certificants must commit to complying with the CFP Board's *Code and Standards* and complete 30 hours of continuing education every two years.

**ITEM 3 DISCIPLINARY INFORMATION**

Kip has no history of any disciplinary events.

**ITEM 4 OTHER BUSINESS ACTIVITIES**

Kip is not engaged in any other business activities.

**ITEM 5 ADDITIONAL COMPENSATION**

Kip does not receive any economic benefit from a non-advisory client for the provision of advisory services.



**ITEM 6 SUPERVISION**

As a federally-registered investment adviser, BDOWA has adopted policies and procedures that are reasonably designed to prevent and detect violations of the Investment Advisers Act of 1940. Matthew Murray, as the Chief Compliance Officer of the firm, has primary responsibility to oversee and administer those policies and procedures. Furthermore, these written supervisory procedures are reviewed at least annually by Mr. Murray for adequacy and effectiveness and may be amended from time to time to address changing risks and/or regulatory requirements.

Matthew Murray, Chief Compliance Officer of BDOWA, is the designated supervisor of Kip Widing. You may reach Mr. Murray by calling BDOWA at 904.394.0838 or by email to [mpmurray@bdowealth.com](mailto:mpmurray@bdowealth.com).