

January 26, 2024

Brian Liedstrand

Form ADV – Part 2B Brochure Supplement

Hubert, NC

Selective Wealth Management, Inc.

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This brochure supplement provides information about Brian Liedstrand that supplements the Selective Wealth Management, Inc. brochure. You should have received a copy of that brochure. Contact us at 434-515-1517 if you did not receive Selective Wealth Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Brian Liedstrand (CRD # 6339738) is available on the SEC's website at www.adviserinfo.sec.gov.



Item 2: Educational Background and Business Experience

Brian Liedstrand

Year of Birth: 1984

Formal Education After High School:

- Liberty University, BA, Music Ministry, 2007

Business Background:

- Selective Wealth Management, Inc., Investment Adviser Representative, 5/2014 - Present
- USMC, Reserves, Marine Officer, 10/2003 - Present
- Harvest Presbyterian Church PCA, Music Director, 1/2014 - Present

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Brian Liedstrand has no required disclosures under this item.

Item 4 Other Business Activities

Brian Liedstrand works for Harvest Presbyterian Church as a Music Director. Mr. Liedstrand's duties as a Music Director at Harvest Presbyterian Church do not create a conflict of interest to his provision of advisory services through Selective Wealth Management, Inc. In addition, Brian Liedstrand is in the USMC Reserves and commits approximately 16 hours per month to this service. Mr. Liedstrand's duties in the USMC Reserves does not create a conflict of interest to his provision of advisory services through Selective Wealth Management, Inc.

Item 5 Additional Compensation

Refer to the Other Business Activities section above for disclosures on Mr. Liedstrand's receipt of additional compensation because of his other business activities. Also, refer to the Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations section(s) of Selective Wealth Management, Inc.'s firm brochure for additional disclosures on this topic.

Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Selective Wealth Management, Inc., and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Josh Standeven, Chief Compliance Officer

Supervisor phone number: 434-515-1517