

January 26, 2024

Shannon Kirkpatrick, FPQP®

Form ADV – Part 2B Brochure Supplement

Denver, CO

Selective Wealth Management, Inc.

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This brochure supplement provides information about Shannon Kirkpatrick 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 Shannon Kirkpatrick (CRD # 6916348) is available on the SEC's website at www.adviserinfo.sec.gov.



Item 2: Educational Background and Business Experience

Shannon Kirkpatrick, FPQP®

Year of Birth: 1972

Formal Education After High School:

- Liberty University, MAR Theological Studies, 2013
- Liberty University, MA Theological Studies, 2011
- University of Illinois, BS Business Administration, 1995

Business Background:

- Selective Wealth Management, Inc., Investment Adviser Representative, 1/2018 - Present
- Rekindling Ministries, Founder, Executive Director, 7/2007 - Present

Certifications: **FPQP®**

The Financial Paraplanner Qualified Professional (FPQP®) is designed to increase foundational knowledge of the financial services industry – specifically related to financial planning. The program covers the main facets in personal financial planning with a focus on practical application, such as estate, tax, retirement, insurance, and investments. Holding the FPQP™ designation demonstrates the ability to gather, review, and analyze their financial information and offer a comprehensive picture of financial well-being.

To learn more about the FPQP® marks, visit [FPQP Designation | Everything You Need to Know | KaplanFinancial.com](https://www.kaplanfinancial.com/fpqp-designation-everything-you-need-to-know).

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. Shannon Kirkpatrick has no required disclosures under this item.

Item 4 Other Business Activities

Shannon Kirkpatrick is not actively engaged in any other business or occupation (investment-related or otherwise) beyond his capacity as Investment Adviser Representative of Selective Wealth Management, Inc.. Moreover, Mr. Kirkpatrick does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

Item 5 Additional Compensation

Shannon Kirkpatrick does not receive any additional compensation beyond that received as an Investment Adviser Representative of Selective Wealth Management, Inc.

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