

RICHARD PHILIPOVICH, APMA®

ADV PART 2B

This brochure provides supplemental information about Richard Philipovich. This supplements the Adair Wealth Management ADV Part 2A brochure, which should have also been provided to you. Please contact us at (206) 607-9281 or by email at rick.philipovich@adairwealth.com if you have any questions or wish to request a copy of the ADV Part 2A brochure.

Additional information about Adair Wealth Management is also available at the SEC's website www.adviserinfo.sec.gov (select "investment adviser firm" and type in our firm name). Results will provide you both Part 1 and 2 of our Form ADV.

ITEM 1 – COVER PAGE BROCHURE ADV PART 2 B

MARCH 28, 2025

INDIVIDUAL CRD# 7503034
12819 SE 38th Street #485, BELLEVUE, WA 98006
RICK.PHILOPOVICH@ADAIRWEALTH.COM
(206) 607-9281

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Richard Philipovich, APMA®

Year Born: 1967

Educational Background:

B.A.E., Architectural Engineering – Penn State University (1990)

Business Background:

03/2022 – Present: *Investment Advisor Representative*, Adair Wealth Management LLC dba Adair Wealth Management

11/2018 – 07/2023: *Project Executive*, BNBuilders

02/2018 – 10/2018: *Sr. Manager*, Cornerstone General Contractors

09/2007 – 01/2018: *Project Executive*, BNBuilders

Professional Designation:

Accredited Portfolio Management Advisor™ (APMA®)

Explanation of Designation:

Accredited Portfolio Management Advisor™ (APMA®)

The APMA® designation is issued by the College for Financial Planning. To attain the right to use the APMA® designation, an individual must satisfactorily fulfill the following requirements:

- ✓ Complete a course of study focusing on program concepts
- ✓ Pass a final designation exam
- ✓ Complete 16 hours of continuing education requirements every two years

APMA holders are subject to disciplinary rules and procedures including a customer complaint process administered by the College for Financial Planning.

ITEM 3 - DISCIPLINARY INFORMATION

Richard Philipovich has no legal or disciplinary events that are material to you or a prospective client's evaluation of this advisory business.

ITEM 4 - OTHER BUSINESS ACTIVITIES

The principal business of Richard Philipovich is that of an investment advisor representative and provider of financial planning services. Richard Philipovich has no other business activities to report.

ITEM 5 - ADDITIONAL COMPENSATION

Other than work with Adair Wealth Management and any disclosures made in Items 2 and 4 above, Richard Philipovich receives no additional compensation related to outside business activities.

ITEM 6 - SUPERVISION

Wendy A. Britton is the sole managing member of Adair Wealth Management and is the supervising authority. Wendy A. Britton remains aware of and keeps us in compliance with the current rules and regulations put forth by each ruling regulatory authority where we conduct our business. Adair Wealth Management maintains a written compliance manual that is reviewed with employees when they are hired as well as annually. Adair Wealth Management has established internal policies for the guidance of its trading personnel. Transactions, which vary from the guidelines, are subject to periodic supervisory review. These guidelines are reviewed yearly and periodically adjusted.

Wendy A. Britton is located at 3854 139th Ave SE, Bellevue, WA 98006 and can be reached by calling (206) 607-9281 or emailing wendy.britton@adairwealth.com.

ITEM 7 - REQUIREMENTS FOR STATE-REGISTERED ADVISERS

Other than any disclosures made in Item 3 above, Richard Philipovich has not been found liable in any additional material arbitration or liable in a civil, self-regulatory organization, or administrative proceeding involving an investment or an investment-related business or activity; fraud, false statement(s), or omissions; theft, embezzlement, or other wrongful taking of property; bribery, forgery, counterfeiting, or extortion; or dishonest, unfair, or unethical practices. Richard Philipovich has never been the subject of a bankruptcy petition.
