

## Item 1 Cover Page

A.

### **Peter Knoer**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated March 6, 2023

Contact: James E. Bogart, Chief Compliance Officer  
2010 Corporate Ridge, Suite 650  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Peter Knoer that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact James E. Bogart, Chief Compliance Officer, if you did *not* receive Bogart Wealth, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Peter Knoer is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## **Item 2 Education Background and Business Experience**

Peter Knoer was born in 1955. Mr. Knoer graduated from the University of Houston in 1977, with a Bachelor of Science degree in Chemical Engineering, in 1980 with an MBA in Engineering and with a Master of Science degree in Chemical Engineering. Mr. Knoer has been an investment adviser representative of Bogart Wealth, LLC since June 2016. From November 2014 through June 2016, Mr. Knoer was an investment adviser representative and registered representative of Morgan Stanley. From April 2013 through November 2014, Mr. Knoer was a Financial Advisor with RBC Wealth Management. From June 1978 through April 2013, Mr. Knoer was an Executive with ExxonMobil.

Mr. Knoer has been a CERTIFIED FINANCIAL PLANNER™ professional since 2015.

Mr. Knoer is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is

voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.cfp.net](http://www.cfp.net).

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a 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. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Item 3 Disciplinary Information**

None.

#### **Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### **Item 5 Additional Compensation**

Mr. Knoer's annual compensation is based, in part, on the number of clients that Mr. Knoer introduces to the Registrant. Accordingly, Mr. Knoer has a conflict of interest for recommending the Registrant to clients for investment advisory services, as the recommendation could be made on the basis of compensation to be received, rather than on a client or prospective client's best interests.

#### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, James E. Bogart, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Bogart at (703) 570-8651.

**Item 1 Cover Page**

A.

**Michael Patrick Duffy**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated March 6, 2023

Contact: James E. Bogart, Chief Compliance Officer

2010 Corporate Ridge, Suite 650

McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Michael Patrick Duffy that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact James E. Bogart, Chief Compliance Officer, if you did *not* receive Bogart Wealth, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Michael Patrick Duffy is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

**Item 2 Education Background and Business Experience**

Michael Patrick Duffy was born in 1987. Mr. Duffy graduated from the University of Alabama in 2012, with a Bachelor of Science degree in Commerce and Business Administration. Mr. Duffy has been an investment adviser representative of Bogart Wealth, LLC since June 2016. From November 2014 through June 2016, Mr. Duffy was a Financial Advisor with Morgan Stanley. From September 2012 through November 2014, Mr. Duffy was a Client Service Associate with RBC Wealth Management.

**Item 3 Disciplinary Information**

None.

#### **Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### **Item 5 Additional Compensation**

Mr. Duffy's annual compensation is based, in part, on the number of clients that Mr. Duffy introduces to the Registrant. Accordingly, Mr. Duffy has a conflict of interest for recommending the Registrant to clients for investment advisory services, as the recommendation could be made on the basis of compensation to be received, rather than on a client or prospective client's best interests.

#### **Item 6 Supervision**

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## Item 1 Cover Page

A.

**James E. Bogart**

Bogart Wealth, LLC

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Contact: James E. Bogart, Chief Compliance Officer  
2010 Corporate Ridge, Suite 650  
McLean, Virginia 22102

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**This Brochure Supplement provides information about James E. Bogart that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact James E. Bogart, Chief Compliance Officer, if you did *not* receive Bogart Wealth, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about James E. Bogart is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## Item 2 Education Background and Business Experience

James E. Bogart was born in 1985. Mr. Bogart graduated from the University of Virginia in 2007, with a Bachelor of Arts degree in Economics. Mr. Bogart has been the Chief Compliance Officer, Chief Executive Officer, President and an investment adviser representative of Bogart Wealth, LLC since June 2016. Mr. Bogart was a registered representative of Purshe Kaplan Sterling Investments, Inc. from June 2016 through May 2020. From November 2014 through June 2016, Mr. Bogart was an investment adviser representative and registered representative of Morgan Stanley. From March 2008 through November 2014, Mr. Bogart was a Vice President of RBC Wealth Management.

Mr. Bogart has been a CERTIFIED FINANCIAL PLANNER™ professional since 2009.

Mr. Bogart is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is

voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.cfp.net](http://www.cfp.net).

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- **Education** – Earn a 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. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
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- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
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- **Ethics** – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Mr. Bogart has held the designation of Chartered Financial Consultant (ChFC®) since 2008. The ChFC® designation is awarded by The American College, an accredited private educational institution that offers both undergraduate and graduate training programs. Prerequisites include high school education and three years of full-time business experience within the five years preceding the awarding of the designation. Average study time to earn the ChFC® exceeds 450 hours, to complete the 8 required college-level courses and pass the final exam for each course. Required courses cover topics, including retirement and estate planning; insurance planning; financial process and environment, income tax planning; employee benefits planning; asset protection planning and estate tax, transfer tax, and gift tax planning; and applications of comprehensive financial planning and

consulting. Certification requires 30 CE credits every two years. ChFC® charterholders are held to a fiduciary standard and agree to comply with The American College code of ethics and procedures.

### **Item 3 Disciplinary Information**

None.

### **Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

None.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, James E. Bogart, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Bogart at (703) 570-8651.

## Item 1 Cover Page

A.

**Nell R. Cordick**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated March 6, 2023

Contact: James E. Bogart, Chief Compliance Officer  
2010 Corporate Ridge, Suite 650  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Nell R. Cordick that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact James E. Bogart, Chief Compliance Officer, if you did *not* receive Bogart Wealth, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Nell R. Cordick is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## Item 2 Education Background and Business Experience

Nell R. Cordick was born in 1960. Ms. Cordick graduated from the University of Virginia in 1982, with a Bachelor of Arts degree in US Government and Foreign Affairs. Ms. Cordick has been an investment adviser representative Vice President of Bogart Wealth, LLC since April 2020. From April 2004 through December 2018, Ms. Cordick held various positions with BB&T, most recently as Regional Director.

Ms. Cordick has been a CERTIFIED FINANCIAL PLANNER™ professional since 2012.

Ms. Cordick is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, she may refer to herself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and she may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.cfp.net](http://www.cfp.net).

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- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Item 3 Disciplinary Information**

None.

#### **Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### **Item 5 Additional Compensation**

Ms. Cordick's annual compensation is based, in part, on the number of clients that Ms. Cordick introduces to the Registrant. Accordingly, Ms. Cordick has a conflict of interest for recommending the Registrant to clients for investment advisory services, as the recommendation could be made on the basis of compensation to be received, rather than on a client or prospective client's best interests.

#### **Item 6 Supervision**

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**Item 1 Cover Page**

A.

**Michael B. Camara**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated March 6, 2023

Contact: James E. Bogart, Chief Compliance Officer  
2010 Corporate Ridge, Suite 650  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Michael B. Camara that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact James E. Bogart, Chief Compliance Officer, if you did *not* receive Bogart Wealth, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Michael B. Camara is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

**Item 2 Education Background and Business Experience**

Michael B. Camara was born in 1981. Mr. Camara graduated from Ohio University in 2005, with a Bachelor of Science degree in Sociology with a Minor in Business. Mr. Camara has been a Financial Advisor of Bogart Wealth, LLC since November 2020. From November 2018 through November 2020, Mr. Camara was a Vice President, Senior Wealth Manager with Goldman Sachs PFM. From April 2015 through June 2018, Mr. Camara was a Portfolio Specialist with Fidelity Investments.

Mr. Camara has been a CERTIFIED FINANCIAL PLANNER™ professional since 2018.

Mr. Camara is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.cfp.net](http://www.cfp.net).

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- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Item 3 Disciplinary Information**

None.

#### **Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### **Item 5 Additional Compensation**

Mr. Camara's annual compensation is based, in part, on the number of clients that Mr. Camara introduces to the Registrant. Accordingly, Mr. Camara has a conflict of interest for recommending the Registrant to clients for investment advisory services, as the recommendation could be made on the basis of compensation to be received, rather than on a client or prospective client's best interests.

#### **Item 6 Supervision**

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## Item 1 Cover Page

A.

### **Jennifer Mascarenas**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated March 6, 2023

Contact: James E. Bogart, Chief Compliance Officer  
2010 Corporate Ridge, Suite 650  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Jennifer Mascarenas that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact James E. Bogart, Chief Compliance Officer, if you did *not* receive Bogart Wealth, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Jennifer Mascarenas is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## **Item 2 Education Background and Business Experience**

Jennifer Mascarenas was born in 1974. Ms. Mascarenas graduated from Arizona State University in 2001, with a Bachelor of Science degree in Finance. Ms. Mascarenas was an Associate Financial Advisor of Bogart Wealth, LLC from October 2021 through September 2022 and is currently a Financial Planner. From February 2020 through October 2021, Ms. Mascarenas was a Trust Advisor with Northern Trust. From August 2015 through February 2019, Ms. Mascarenas was an Associate Wealth Advisor with Mariner Wealth Advisors.

Ms. Mascarenas has been a CERTIFIED FINANCIAL PLANNER™ professional since 2019.

Ms. Mascarenas is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, she may refer to herself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and she may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is

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- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Item 3 Disciplinary Information**

None.

#### **Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### **Item 5 Additional Compensation**

None.

#### **Item 6 Supervision**

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**Item 1 Cover Page**

A.

**Jung Hwa Seh**

Bogart Wealth, LLC

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Dated March 6, 2023

Contact: James E. Bogart, Chief Compliance Officer  
2010 Corporate Ridge, Suite 650  
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**Additional information about Jung Hwa Seh is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

**Item 2 Education Background and Business Experience**

Jung Hwa Seh was born in 1977. Ms. Seh graduated from University of Maryland, University College in 2009, with a Bachelor of Science degree in Finance. Ms. Seh has been a Financial Advisor of Bogart Wealth, LLC since April 2022. From July 2016 through August 2020, Ms. Seh was a Wealth Management Advisor with TIAA and was unemployed from August 2020 through March 2022.

**Item 3 Disciplinary Information**

None.

#### **Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### **Item 5 Additional Compensation**

None.

#### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, James E. Bogart, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Bogart at (703) 570-8651.

## Item 1 Cover Page

A.

**Sydney E. Rutledge**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated March 6, 2023

Contact: James E. Bogart, Chief Compliance Officer  
2010 Corporate Ridge, Suite 650  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Sydney E. Rutledge that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact James E. Bogart, Chief Compliance Officer, if you did *not* receive Bogart Wealth, LLC's Brochure or if you have any questions about the contents of this supplement.**

Additional information about Sydney E. Rutledge is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

## Item 2 Education Background and Business Experience

Sydney E. Rutledge was born in 1997. Ms. Rutledge graduated from Texas A&M University in 2020, with a Bachelor of Business Administration degree in Finance with a minor in Financial Planning. Ms. Rutledge has been an Associate Financial Advisor of Bogart Wealth, LLC since October 2021. Ms. Rutledge was a Client Service Associate of Bogart Wealth, LLC from May 2020 through September 2021. Ms. Rutledge was a part-time Client Service Associate from January 2020 through April 2020 and was a full time student prior to that.

Ms. Rutledge has been a CERTIFIED FINANCIAL PLANNER™ professional since 2022.

Ms. Rutledge is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, she may refer to herself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and she may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is

voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.cfp.net](http://www.cfp.net).

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a 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. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Item 3 Disciplinary Information**

None.

**Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**Item 5 Additional Compensation**

None.

**Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, James E. Bogart, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Bogart at (703) 570-8651.

## Item 1 Cover Page

A.

### **Brian Windsor**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated March 6, 2023

Contact: James E. Bogart, Chief Compliance Officer  
2010 Corporate Ridge, Suite 650  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Brian Windsor that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact James E. Bogart, Chief Compliance Officer, if you did *not* receive Bogart Wealth, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Brian Windsor is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## **Item 2 Education Background and Business Experience**

Brian Windsor was born in 1983. Mr. Windsor graduated from University of Maryland, Baltimore County in 2006, with a Bachelor of Arts degree in Economics. Mr. Windsor has been a Vice President and Financial Consultant of Bogart Wealth, LLC since May 2022. From October 2010 through April 2022, Mr. Windsor was a Vice President and Financial Consultant of Fidelity Investments.

Mr. Windsor has been a CERTIFIED FINANCIAL PLANNER™ professional since 2014.

Mr. Windsor is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.cfp.net](http://www.cfp.net). CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a 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. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

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- **Ethics** – Commit to complying with CFP Board’s Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional’s services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Item 3 Disciplinary Information**

None.

#### **Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### **Item 5 Additional Compensation**

None.

#### **Item 6 Supervision**

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## Item 1 Cover Page

A.

**Misty L. Garza**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated March 6, 2023

Contact: James E. Bogart, Chief Compliance Officer  
2010 Corporate Ridge, Suite 650  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Misty L. Garza that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact James E. Bogart, Chief Compliance Officer, if you did *not* receive Bogart Wealth, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Misty L. Garza is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## Item 2 Education Background and Business Experience

Misty L. Garza was born in 1976. Ms. Garza graduated from St. Edward's University in 1997, with a Bachelor of Arts degree in International Studies and from the University of Houston in 1999, with an MBA in Business Management. Ms. Garza has been a Financial Advisor of Bogart Wealth, LLC since May 2022. From May 2014 through April 2022, Ms. Garza was a Financial Advisor of Selah Financial Services.

Ms. Garza has been a CERTIFIED FINANCIAL PLANNER™ professional since 2003.

Ms. Garza is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, she may refer to herself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and she may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.cfp.net](http://www.cfp.net).

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

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- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
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- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

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- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Item 3 Disciplinary Information**

None.

**Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**Item 5 Additional Compensation**

None.

**Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, James E. Bogart, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Bogart at (703) 570-8651.

## Item 1 Cover Page

A.

**Morgan B. Veth**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated March 6, 2023

Contact: James E. Bogart, Chief Compliance Officer  
2010 Corporate Ridge, Suite 650  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Morgan B. Veth that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact James E. Bogart, Chief Compliance Officer, if you did *not* receive Bogart Wealth, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Morgan B. Veth is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## Item 2 Education Background and Business Experience

Morgan B. Veth was born in 1984. Ms. Veth graduated from the University of Mississippi in 2006, with a Bachelor of Business Administration degree. Ms. Veth has been a Vice President and Financial Advisor of Bogart Wealth, LLC since July 2022. From November 2006 through June 2022, Ms. Veth was a Wealth Planner with Fidelity Investments.

Ms. Veth has been a CERTIFIED FINANCIAL PLANNER™ professional since 2012.

Ms. Veth is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, she may refer to herself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and she may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.cfp.net](http://www.cfp.net). CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

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- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
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- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Item 3 Disciplinary Information**

None.

**Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**Item 5 Additional Compensation**

None.

**Item 6 Supervision**

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## Item 1 Cover Page

A.

**Daniel M. Evans**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated March 6, 2023

Contact: James E. Bogart, Chief Compliance Officer  
2010 Corporate Ridge, Suite 650  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Daniel M. Evans that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact James E. Bogart, Chief Compliance Officer, if you did *not* receive Bogart Wealth, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Daniel M. Evans is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## Item 2 Education Background and Business Experience

Daniel M. Evans was born in 1983. Mr. Evans graduated from the University of North Texas in 2006, with a Bachelor of Arts degree in Advertising. Mr. Evans has been a Financial Advisor of Bogart Wealth, LLC since October 2022. From November 2016 through October 2022, Mr. Evans was a Financial Advisor with Wells Fargo Clearing Services.

Mr. Evans has been a CERTIFIED FINANCIAL PLANNER™ professional since 2018.

Mr. Evans is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.cfp.net](http://www.cfp.net).

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- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

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- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Item 3 Disciplinary Information**

None.

#### **Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### **Item 5 Additional Compensation**

None.

#### **Item 6 Supervision**

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## Item 1 Cover Page

A.

### **Patrick J. Marcinko**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated March 6, 2023

Contact: James E. Bogart, Chief Compliance Officer  
2010 Corporate Ridge, Suite 650  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Patrick J. Marcinko that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact James E. Bogart, Chief Compliance Officer, if you did *not* receive Bogart Wealth, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Patrick J. Marcinko is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## **Item 2 Education Background and Business Experience**

Patrick J. Marcinko was born in 1998. Mr. Marcinko graduated from Virginia Polytechnic Institute and State University in 2020, with a Bachelor of Science degree in Business. Mr. Marcinko has been an Associate Financial Advisor of Bogart Wealth, LLC since January 2022. From June 2020 through December 2022, Mr. Marcinko was a Financial Analyst with Goldman Sachs and was a full time student prior to that.

Mr. Marcinko has been a CERTIFIED FINANCIAL PLANNER™ professional since 2022.

Mr. Marcinko is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.cfp.net](http://www.cfp.net).

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- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

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- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Item 3 Disciplinary Information**

None.

**Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**Item 5 Additional Compensation**

None.

**Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, James E. Bogart, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Bogart at (703) 570-8651.

## Item 1 Cover Page

A.

**Jason M. Gulosh**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated March 6, 2023

Contact: James E. Bogart, Chief Compliance Officer  
2010 Corporate Ridge, Suite 650  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Jason M. Gulosh that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact James E. Bogart, Chief Compliance Officer, if you did *not* receive Bogart Wealth, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Jason M. Gulosh is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## Item 2 Education Background and Business Experience

Jason M. Gulosh was born in 1977. Mr. Gulosh graduated from The College of William & Mary in 1999, with a Bachelor of Arts degree in Business Administration. Mr. Gulosh has been the Director Advisory of Bogart Wealth, LLC since March 2023. From November 2018 through February 2023, Mr. Gulosh was a Regional Director with Financial Engines Advisors LLC. From October 2017 through November 2018, Mr. Gulosh was a Regional Director with Edelman Financial Services LLC

Mr. Gulosh has been a CERTIFIED FINANCIAL PLANNER™ professional since 2006.

Mr. Gulosh is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.cfp.net](http://www.cfp.net).

CFP® professionals have met CFP Board’s high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a 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. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board’s Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Item 3 Disciplinary Information**

None.

#### **Item 4 Other Business Activities**

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### **Item 5 Additional Compensation**

None.

#### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, James E. Bogart, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Bogart at (703) 570-8651.