

## Item 1 Cover Page

A.

**Peter Knoer**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
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 Suzanne E. Kellogg, 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 Cincinnati in 1977, with a Bachelor of Science degree in Chemical Engineering, and from the University of Houston in 1980 with an MBA and in 1983 with a Master of Science degree in Chemical Engineering. Mr. Knoer spends the majority of his time as Bogart Wealth's Corporate Trainer, and has been a Financial Advisor and Vice President 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. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- **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**

All employees of the Firm are eligible to participate in an internal referral program designed to incentivize employees for contributing to client acquisition efforts through potential monetary rewards for successful client referrals.

#### **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, Suzanne E. Kellogg, 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 Ms. Kellogg at (703) 570-8651.

**Item 1 Cover Page**

A.

**Michael Patrick Duffy**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
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 Suzanne E. Kellogg, 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 a Financial Advisor and Vice President 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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Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
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 Suzanne E. Kellogg, 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 a Financial Advisor 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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- **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**

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### **Item 6 Supervision**

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## Item 1 Cover Page

A.

**Nell R. Cordick**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
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 Suzanne E. Kellogg, 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 a Financial Advisor and Senior 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 January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
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 Suzanne E. Kellogg, 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 and Vice President 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

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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.

**Jung Hwa Seh**

Bogart Wealth, LLC

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Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
McLean, Virginia 22102

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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.

Ms. Seh has been a CERTIFIED FINANCIAL PLANNER™ professional since 2023.

Ms. Seh 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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### **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. Seh's annual compensation is based, in part, on the number of clients that Ms. Seh introduces to the Registrant. Accordingly, Ms. Seh 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.

**Sydney E. Rutledge**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
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 Suzanne E. Kellogg, 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 Financial Advisor of Bogart Wealth since January 2024 and previously served as an Associate Financial Advisor of Bogart Wealth from October 2021 to January 2024. 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. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- **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**

Ms. Rutledge's annual compensation is based, in part, on the number of clients that Ms. Rutledge introduces to the Registrant. Accordingly, Ms. Rutledge 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, Suzanne E. Kellogg, 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 Ms. Kellogg at (703) 570-8651.

## Item 1 Cover Page

A.

### **Brian Windsor**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
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 Suzanne E. Kellogg, 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 Advisor 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).

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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.
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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. Windsor's annual compensation is based, in part, on the number of clients that Mr. Windsor introduces to the Registrant. Accordingly, Mr. Windsor 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.

**Misty L. Garza**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
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 Suzanne E. Kellogg, 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 and Vice President 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).

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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. CFP Board implemented the bachelor’s degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor’s or higher degree or completed a financial planning development capstone course.
- **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**

Ms. Garza's annual compensation is based, in part, on the number of clients that Ms. Garza introduces to the Registrant. Accordingly, Ms. Garza 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.

**Morgan B. Veth**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
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 Suzanne E. Kellogg, 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).

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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. Veth's annual compensation is based, in part, on the number of clients that Ms. Veth introduces to the Registrant. Accordingly, Ms. Veth 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.

**Daniel M. Evans**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
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 Suzanne E. Kellogg, 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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- **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. Evans' annual compensation is based, in part, on the number of clients that Mr. Evans introduces to the Registrant. Accordingly, Mr. Evans 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.

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## Item 1 Cover Page

A.

**Patrick J. Marcinko**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
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 Suzanne E. Kellogg, 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 a Financial Advisor of Bogart Wealth, LLC since January 2024 and previously served as an Associate Financial Advisor of Bogart Wealth from January 2022 through January 2024. 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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- **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. Marcinko's annual compensation is based, in part, on the number of clients that Mr. Marcinko introduces to the Registrant. Accordingly, Mr. Marcinko 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, Suzanne E. Kellogg, 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 Ms. Kellogg at (703) 570-8651.

## Item 1 Cover Page

A.

**Nicolas A. Conforti**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Nicolas A. Conforti that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact Suzanne E. Kellogg, 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 Nicolas A. Conforti is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## Item 2 Education Background and Business Experience

Nicolas A. Conforti was born in 1998. Mr. Conforti graduated from Virginia Tech in 2021, with a Bachelor of Science degree in Finance. Since June 2024, Mr. Conforti has been an Associate Financial Advisor of Bogart Wealth. From June 2021 through June 2024, he participated in Bogart Wealth's Advisor Growth Track program. From May 2020 through August 2020, Mr. Conforti was an Intern with Clarendon Wealth Management and was a full-time student prior to that.

Mr. Conforti has been a CERTIFIED FINANCIAL PLANNER™ professional since 2023.

Mr. Conforti 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:

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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**

All employees of the Firm are eligible to participate in an internal referral program designed to incentivize employees for contributing to client acquisition efforts through potential monetary rewards for successful client referrals.

#### **Item 6 Supervision**

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**Item 1 Cover Page**

A.

**Amanda M. Muse**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Amanda M. Muse that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact Suzanne E. Kellogg, 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 Amanda M. Muse is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

**Item 2 Education Background and Business Experience**

Amanda M. Muse was born in 1989. Ms. Muse graduated from Louisiana Tech University in 2011, with a Bachelor of Arts degree in Sociology. Ms. Muse has served as a Bogart Wealth Vice President and Director of Advisory since June 2024. From December 2023 through June 2024, she served as a Regional Manager and Financial Advisor at Bogart Wealth. From August 2017 through September 2023, Ms. Muse was a Director of Wealth Management at The Mather Group.

Ms. Muse has been a CERTIFIED FINANCIAL PLANNER™ professional since 2016.

Ms. Muse 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. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- **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.
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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**

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#### **Item 6 Supervision**

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#### **Item 1 Cover Page**

A.

**Leah M. Dwyer**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Leah M. Dwyer that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact Suzanne E. Kellogg, 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 Leah M. Dwyer is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

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

Leah M. Dwyer was born in 1985. Ms. Dwyer graduated from Kent State University in 2009, with a Bachelor of Business Administration in Economics. Ms. Dwyer has been an Associate Financial Advisor at Bogart Wealth, LLC since January 2024. From October 2021 through January 2024, Ms. Dwyer was an Associate Financial Planner at Waterway Wealth Management. From November 2019 to October 2021, she was a Director of Client Services at Austin National Financial. From January 2018 through November 2019, she was an Investor Relations Associate at MicroVentures.

Ms. Dwyer has been a CERTIFIED FINANCIAL PLANNER™ professional since 2021.

Ms. Dwyer 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**

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#### **Item 6 Supervision**

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## Item 1 Cover Page

A.

**Chaz H. Billak**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Chaz H. Billak that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact Suzanne E. Kellogg, 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 Chaz H. Billak is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## Item 2 Education Background and Business Experience

Chaz H. Billak was born in 2000. Mr. Billak graduated from Virginia Tech in 2022, with a Bachelor of Science in Finance with a concentration in Financial Planning. Mr. Billak has been an Advisor Growth Track Associate at Bogart Wealth, LLC since June 2022. Prior to 2022, Mr. Billak was a full-time student.

Mr. Billak has been a CERTIFIED FINANCIAL PLANNER™ professional since 2024.

Mr. Billak 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®

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### **Item 3 Disciplinary Information**

None.

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

- B. 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**

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## Item 1 Cover Page

A.

**Sandra L. Terronez**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
McLean, Virginia 22102

B.

**This Brochure Supplement provides information about Sandra L. Terronez that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact Suzanne E. Kellogg, 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 Sandra L. Terronez is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## Item 2 Education Background and Business Experience

Sandra L. Terronez was born in 1976. Ms. Terronez graduated from St. Mary's University in 1998, with a Bachelor of Business Administration degree in International Business and from University of the Incarnate Word in 2002 with an MBA. Prior to re-joining Bogart Wealth as a Financial Planning Manager, Ms. Terronez was an Investment Adviser Representative with 4J Wealth Management from February 2023 through July 2024. Ms. Terronez was previously a Senior Financial Planner of Bogart Wealth, LLC from February 2020 through February 2023. From July 2019 through December 2018, Ms. Terronez was a Financial Planning Specialist with Cope Corrales. From March 2018 through June 2019, Ms. Terronez was a Director of Financial Planning with Henderson Financial and was a stay at home mom prior to that.

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



Ms. Terronez 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.

Ms. Terronez has held the designation of Certified Tax Specialist (CTS™) since 2021. The CTS™ credential is issued by the Institute of Business and Finance. The CTS™ credential provides holders with knowledge of how to help reduce clients’ tax obligations. CTS™ designation holders can provide guidance on who must file an income tax return, the impact of current tax regulations, business income and home businesses, tax credits, itemized deductions, and retirement plans, and LLCs and S corporations. To be eligible to obtain the CTS™ designation, a candidate must have a

bachelor's degree or one year of financial services work experience. To obtain the designations, candidates must study for an online, closed-book examination. Designation holders must complete 30 hours of continuing education every two years to maintain the CTS™ designation.

### **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**

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### **Item 6 Supervision**

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## Item 1 Cover Page

A.

**Grayson M. Kirby**

Bogart Wealth, LLC

ADV Part 2B, Brochure Supplement  
Dated January 31, 2025

Contact: Suzanne E. Kellogg, Chief Compliance Officer  
2010 Corporate Ridge, Suite 900  
McLean, Virginia 22102

C.

**This Brochure Supplement provides information about Grayson Kirby that supplements the Bogart Wealth, LLC Brochure; you should have received a copy of that Brochure. Please contact Suzanne E. Kellogg, 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 Grayson Kirby is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## Item 2 Education Background and Business Experience

Grayson Kirby was born in 2000. Mr. Kirby graduated from Virginia Tech in 2022, with a Bachelor of Science in Finance and a concentration in Financial Planning. Mr. Kirby has been an Advisor Growth Track Associate at Bogart Wealth, LLC since February 2023. Prior to 2023, Mr. Kirby was a full-time student.

Mr. Kirby has been a CERTIFIED FINANCIAL PLANNER™ professional since 2025.

Mr. Kirby 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**

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

## **Item 5 Additional Compensation**

All employees of the Firm are eligible to participate in an internal referral program designed to incentivize employees for contributing to client acquisition efforts through potential monetary rewards for successful client referrals.

## **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, Suzanne E. Kellogg, 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 solicitor 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 Ms. Kellogg at (703) 570-8651.