Richard R. Kirk, CAPP™, CSS™, RFC®

ADVISOR SHARE WEALTH MANAGEMENT

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FORM ADV PART 2B

BROCHURE SUPPLEMENT

June 2023

This brochure supplement provides information about Richard Kirk that supplements the Peace of Mind Planning LLC d/b/a Advisor Share Wealth Management brochure. You should have received a copy of that brochure. Contact us at 866-232-3251 if you did not receive the firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Richard Kirk (CRD # 5896320) is available on the U.S. Securities and Exchange Commission's ("SEC") website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Year of Birth: 1951

Formal Education After High School:
Illinois Central College; 1969-1971

Business Background:

- Advisor Share Wealth Management; Investment Advisor Representative; 06/2022 – Present
- Lifeguard Retirement Planning; Insurance Broker; 08/2007 – Present
- Virtue Capital Management, LLC; Investment Advisor Representative; 04/2019 – 06/2022
- Horter Investment Management; Investment Advisor Representative; 09/2018 – 04/2019
- Gradient Advisors, LLC; Investment Advisor Representative; 03/2011 – 06/2013

Professional Designations:

- **Certified Asset Protection Planner (CAPP)** - The CAPP designation is issued by the Wealth Preservation Institute. Candidates studying for the CAPP designation must successfully pass a proctored exam. To retain the CAPP designation, individuals must obtain 18 hours of continuing education.
- **Certified Social Security and Medicare Specialist (CSS)** - The CSS designation is issued by the Institute of Business & Finance. Candidates studying for the CSS designation must successfully pass a proctored exam. To retain the CSS designation, individuals must obtain 30 hours of continuing education.
- **Registered Financial Consultant (RFC)** - The RFC designation is issued by the International Association of Registered Financial Consultants. RFC applicants must have a minimum of three years of experience in financial services and satisfy the IARFC's education requirements. RFC members must complete 40 hours of continuing education every two years and re-certify the designation annually.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license.

Richard Kirk does not have any reportable legal or disciplinary events. Nor has Mr. Kirk been subject to any reportable criminal or civil actions, administrative proceedings, self-regulatory organization (SRO) proceedings, revocations, or suspensions. Clients and prospective clients can view the CRD records (registration records) for Richard Kirk through the SEC's Investment Adviser Public Disclosure (IAPD) website at www.adviserinfo.sec.gov.

Item 4 Other Business Activities

Richard Kirk is licensed as an independent insurance agent with Lifeguard Retirement planning, an insurance agency. Richard Kirk may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients. Advisory clients may purchase recommended insurance products from other insurance agents not affiliated with Advisor Share Wealth Management.

Richard Kirk will earn commission-based compensation for selling insurance products, including insurance products he sells to you. Insurance commissions earned are separate and in addition to our advisory fees. This practice presents a conflict of interest because Mr. Kirk has an incentive to recommend insurance products for the purpose of generating commissions rather than solely based

on the client's needs. Clients are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with Advisor Share Wealth Management.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on, Mr. Kirk's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation*, *Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Advisor Share Wealth Management's firm brochure for additional disclosures on this topic.

Except as otherwise disclosed herein, Mr. Kirk does not receive economic benefits (sales awards and other prizes) from someone who is not a client.

Item 6 Supervision

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

Bruce Blair Schadler is the Chief Compliance Officer of Advisor Share Wealth Management. As. as such, Mr. Schadler is responsible for supervisory matters relating to the Advisor Share Wealth Management.

Please call 866-232-3251 to discuss any matters relating to the advisory services offered by Mr. Kirk.