

# W3 Wealth Advisors LLC.

90 N Miller Rd

Akron, OH 44333

(330) 836-3805

March 31, 2019

Part 2B of Form AD

This brochure supplement provides information about **Jonathan Lapine**, Investment Advisor Representative, which supplements the W3 Wealth Advisors, LLC ("W3") Form ADV Part 2A Brochure. If you have any questions about the contents of this Brochure, please contact us at (330) 836-3805 or via e-mail at [Frank2@w3wealth.com](mailto:Frank2@w3wealth.com). Please inform **Jonathan Lapine** at the contact information listed on page 2 if you did not receive W3's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement. Additional information about W3 and **Jonathan Lapine** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and FINRA's website at [www.finra.org/brokercheck](http://www.finra.org/brokercheck).

## Jonathan Lapine

8700 E. Market St. Ste. 7A  
Warren, OH 44484  
(330) 856-6345

This Brochure Supplement provides information about **Jonathan Lapine**, Independent Investment Advisor Representative, which supplements the W3 Wealth Advisors, LLC. ("W3") Form ADV Part 2A Brochure. Please inform **Jonathan Lapine** at the contact information listed above if you did not receive W3's Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement. Additional information about W3 and **Jonathan Lapine** is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and FINRA's website at [www.finra.org/brokercheck](http://www.finra.org/brokercheck).

**Date of Birth:** 9/25/1984

### Education:

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The Ohio State University, BSBA – Accounting, 2007

### Examinations and Professional Designations:

Series 7 — General Securities Representative  
Series 63 — Uniform Securities Agent State Law Exam  
Series 66 — Investment Advisory Representative  
CFP® — CERTIFIED FINANCIAL PLANNER™  
CPA — Certified Public Accountant

### Business Experience:

- 2014-Present Partner, W3 Wealth Management
- 2014-Present Investment Advisor, W3 Wealth Advisors, LLC.
- 2014-Present Investment Advisor, Valmark Advisers, Inc.
- 2013-Present Registered Representative, Valmark Securities, Inc.
- 2011-2013 Financial Planning & Analysis, Cardinal Health
- 2007-2011 Internal Audit Specialist, Nationwide Insurance
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**CFP® - CERTIFIED FINANCIAL PLANNER™**

The CFP® designation is offered and recognized by the Certified Financial Planning Board of Standards, Inc. Candidates must have a bachelor's degree (or higher) from an accredited college or university and at least 3 years of full-time personal financial planning experience. Certificate holders must complete a CFP®-board registered program or hold one of the following designations; CPA, ChFC®, CLUO, CFA®, Ph.D. in business or economics, Doctor of Business Administration, or an Attorney's License. Certificants must also successfully pass a 2-day comprehensive examination and complete 30 hours of continuing education credits every 2 years.

**CPA — Certified Public Accountant**

The CPA designation is offered by the American Institute of Certified Public Accountants® (AICPA®). The requirements to become a CPA include; a) an educational requirement that varies from state to state, but generally consists of 150 credit hours with a predetermined number of accounting credit hours, b) passing all 4 parts of the uniform CPA exam with a 75% or higher (eligibility to sit for exam depends on the state) and, c) 1-2 years of experience under a CPA (varies by state). The AICPA® also requires CPAs to perform continuing professional education, typically 40 hours per year, as well as renewing their licenses every 1, 2 or 3 years.

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**Disciplinary information**

Registered Investment Advisers are required to disclose material facts regarding any investment related legal or disciplinary events, including issues involving criminal or civil actions, findings resulting from administrative proceeding before the SEC, a self-regulatory body or any other federal or state regulatory authority that would be material to your evaluation of each supervised person providing investment advice.

Jonathan Lapine has no disciplinary record that would impact a client's evaluation of the practice.

**Other Business Activities**

Jonathan Lapine is an Investment Advisory Representative of Valmark Advisers, Inc., an SEC registered Investment Adviser. As an investment advisor representative of Valmark Advisers, Jonathan Lapine is eligible to receive fees associated with work performed for customers of that Advisory firm. These fees are separate from fees earned for work with W3.

Jonathan Lapine is a Registered Representative of Valmark Securities, Inc., a broker dealer under common ownership and management of Valmark Advisers, Inc. As a Registered Representative of an affiliated broker dealer, Valmark Securities, Inc., Jonathan Lapine is eligible to receive normal commissions associated with securities sales.

Jonathan Lapine is also an insurance agent affiliated with Executive Insurance Agency, Inc., an agency under common ownership and management of Valmark Advisers, Inc. Jonathan Lapine is also eligible to receive insurance commissions surrounding the sales of insurance products sold through the affiliated insurance agency, Executive Insurance Agency, Inc.

**Additional Compensation**

There is no additional compensation awarded for providing financial planning services, such as sales awards or prizes.

**Supervision**

Before accepting and implementing investment strategies recommended, supervisory principals at W3 review and approve of the investment strategies. Accounts are reviewed periodically, usually at least annually by your advisor. The compliance team also periodically reviews accounts and strategies. These initial and ongoing reviews are under the direction of Chief Compliance Officer, Mr. Frank P. Bevilacqua II who may be reached at (330) 836-3805 or via e-mail at FRANK2@W3WEALTH.COM to discuss questions or concerns in connection with the internal compliance program.

**Information for State Registered Advisors**

Jonathan Lapine has no additional information to disclose.