

**Form ADV Part 2B
Brochure Supplement
For
Travis Hutchinson**

March 07, 2023



HHM Wealth Advisors, LLC

**1200 Market Street
Chattanooga, TN 37402
(423) 826-1670**

thutchinson@hbmwealth.com

www.hbmwealth.com

PURPOSE OF THE BROCHURE SUPPLEMENT:

This *BROCHURE SUPPLEMENT* provides information about Travis Hutchinson that supplements the HHM Wealth Advisors, LLC *FIRM BROCHURE* document. You should have received a copy of the *FIRM BROCHURE*. Please contact Travis Hutchinson if you did not receive the HHM Wealth Advisors, LLC *FIRM BROCHURE* or if you have any questions about the contents of this *BROCHURE SUPPLEMENT*.

Additional information about Travis Hutchinson is available on the SEC's website at www.adviserinfo.sec.gov (the **CRD number for Travis Hutchinson is 4776895**).

NOTE:

While HHM Wealth Advisors, LLC may refer to itself as a "registered investment advisor", clients should be aware that registration itself does not imply any level of skill or training.

EDUCATIONAL AND BUSINESS EXPERIENCE:

Travis Hutchinson

Year of Birth 1979

Education after High School

- University of Colorado at Boulder – BA in Economics, 2001
- Tallahassee Community College – Professional Financial Planning Program, 2008

Business Background for Previous 5 Years:

- HHM Wealth Advisors, LLC 01/2015 – Present
Managing Member and Investment Adviser Representative
- HHM Wealth Advisors, LLC, 07/2009 – 12/2014
Financial Advisor

PROFESSIONAL DESIGNATIONS/CERTIFICATIONS:

CERTIFIED FINANCIAL PLANNER™ professional

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I 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.

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*.

DISCIPLINARY INFORMATION:

Mr. Hutchinson does not have, nor has he ever had any disciplinary disclosure. Clients and prospective clients can view the CRD records (registration records) for Travis Hutchinson through the SEC’s Investment Adviser Public Disclosure (IAPD) website at www.adviserinfo.sec.gov or FINRA’s Broker Check database online at www.finra.org/brokercheck. The CRD number for Travis Hutchinson is 4776895.

OTHER BUSINESS ACTIVITIES:

In addition to being an investment adviser representative (hereafter “IA Rep”) of HHM Wealth Advisors, LLC (hereafter “HHM”), Travis Hutchinson is licensed as an independent insurance agent in Tennessee, Georgia, Alabama and North Carolina.

Travis Hutchinson as an IA Rep of HHM may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients. When such recommendations or sales are made, a conflict of interest exists as Travis Hutchinson may earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. HHM requires that Travis Hutchinson disclose this conflict of interest when such recommendations are made. As a precaution to minimizing conflicts of interest, HHM requires that any commission earned on the sale of such insurance products be assigned to HHM. Also, HHM requires Travis Hutchinson to disclose that advisory clients may purchase recommended insurance products from other insurance agents not affiliated with HHM.

ADDITIONAL COMPENSATION:

Aside from the commissions paid by insurance companies to Travis Hutchinson (see the “OTHER BUSINESS ACTIVITIES” section above), Travis Hutchinson may not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly to HHM.

SUPERVISION:

As Managing Member of HHM, Travis Hutchinson is primarily responsible for supervision of HHM and its IA Reps. As Travis Hutchinson is an IA Rep himself, his accounts are reviewed by Gina Cook, Chief Compliance Officer. Investment and planning recommendations are further reviewed during periodic company-wide investment reviews conducted by the Investment Committee. Gina Cook, Chief Compliance Officer, reviews accounts as a whole in conjunction with the quarterly calculation of advisory fees. Gina Cook may be reached at 423-933-1816.

REQUIREMENTS FOR STATE-REGISTERED ADVISERS:

Since HHM is a SEC Registered Investment Advisor, there are no additional disclosures.

**Form ADV Part 2B
Brochure Supplement
For
Salvatore Geraci**

March 07, 2023



HHM Wealth Advisors, LLC

**1200 Market Street
Chattanooga, TN 37402
(423) 826-1670
sgeraci@hbmwealth.com
www.hbmwealth.com**

PURPOSE OF THE BROCHURE SUPPLEMENT

This *BROCHURE SUPPLEMENT* provides information about Salvatore Geraci that supplements the HHM Wealth Advisors, LLC *FIRM BROCHURE* document. You should have received a copy of the *FIRM BROCHURE*. Please contact Salvatore Geraci if you did not receive the HHM Wealth Advisors, LLC *FIRM BROCHURE* or if you have any questions about the contents of this *BROCHURE SUPPLEMENT*.

Additional information about Salvatore Geraci is available on the SEC's website at www.adviserinfo.sec.gov (the **CRD number for Salvatore Geraci is 1736064**).

NOTE:

While HHM Wealth Advisors, LLC may refer to itself as a "registered investment advisor", clients should be aware that registration itself does not imply any level of skill or training.

EDUCATIONAL AND BUSINESS EXPERIENCE :

Salvatore Geraci

Year of Birth 1946

Education after High School

- Loyola University – 1976 Juris Doctor
- University of New Orleans – 1971 MBA in Finance
- University of New Orleans – 1968 Bachelor of Science in Accounting

Business Background:

- HHM Wealth Advisors, LLC. 01/2015 – Present
Investment Adviser Representative
- HHM Wealth Advisors, LLC, 07/2009 – 12/2014
Managing Member, Financial Advisor, Chief Compliance Officer

PROFESSIONAL DESIGNATIONS/CERTIFICATIONS:

Certified Public Accountant - CPA (Inactive)

State of Tennessee

CERTIFIED FINANCIAL PLANNER™ professional

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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*.

DISCIPLINARY INFORMATION:

Mr. Geraci does not have, nor has he ever had any disciplinary disclosure. Clients and prospective clients can view the CRD records (registration records) for Salvatore Geraci through the SEC’s Investment Adviser Public Disclosure (IAPD) website at www.adviserinfo.sec.gov or FINRA’s Broker Check database online at www.finra.org/brokercheck. The CRD number for Salvatore Geraci is 1736064.

OTHER BUSINESS ACTIVITIES:

Mr. Geraci does not have any additional business activities.

ADDITIONAL COMPENSATION:

Salvatore Geraci may not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly to HHM.

SUPERVISION:

Sal Geraci reports to and is supervised by Managing Member, Travis Hutchinson. Travis Hutchinson may be reached at 423-933-1826.

Investment and planning recommendations are reviewed during periodic company-wide investment reviews conducted by the Investment Committee. Gina Cook, Chief Compliance Officer, reviews accounts as a whole in conjunction with the quarterly calculation of advisory fees. Gina Cook may be reached at 423-933-1816.

REQUIREMENTS FOR STATE-REGISTERED ADVISERS:

Since HHM is a SEC Registered Investment Advisor, there are no additional disclosures.

**Form ADV, Part 2B
Brochure Supplement
For
Andrew Cook**

March 07, 2023



HHM Wealth Advisors, LLC

**1200 Market Street
Chattanooga, TN 37402
(423) 826-1670
acook@hbmwealth.com
www.hbmwealth.com**

PURPOSE OF THE BROCHURE SUPPLEMENT:

This *BROCHURE SUPPLEMENT* provides information about Andrew Cook that supplements the HHM Wealth Advisors, LLC *FIRM BROCHURE* document. You should have received a copy of the *FIRM BROCHURE*. Please contact Andrew Cook if you did not receive the HHM Wealth Advisors, LLC *FIRM BROCHURE* or if you have any questions about the contents of this *BROCHURE SUPPLEMENT*.

Additional information about Andrew Cook is available on the SEC's website at www.adviserinfo.sec.gov (the **CRD number for Andrew Cook is 6035278**).

NOTE:

While HHM Wealth Advisors, LLC may refer to itself as a "registered investment advisor", clients should be aware that registration itself does not imply any level of skill or training.

EDUCATIONAL AND BUSINESS EXPERIENCE:

Andrew Cook

Year of Birth 1977

Education after High School

- Covenant College – Lookout Mountain, GA (1995-1998)
- Colorado Christian University – 2002 B.A. Youth Guidance
- University of Tennessee at Chattanooga – 2006 MBA
- University of Charleston – Charleston, WV - 2009 Executive Financial Planning Program

Business Background:

- HHM Wealth Advisors, LLC, 03/2012 to Present
Investment Adviser Representative
- Community Trust and Investment Company - Ashland, KY 2011-2012
Trust Officer

Professional Designations/Certifications:

CERTIFIED FINANCIAL PLANNER™ professional

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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.
- **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*.

ACCREDITED INVESTMENT FIDUCIARY® (AIF®)

The AIF Designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF Designation, the individual must meet prerequisite criteria based on a combination of education, industry experience and/or ongoing professional development, complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the Code of Ethics. In order to maintain the AIF Designation, the individual must annually renew their affirmation of the Code of Ethics and complete six hours of continuing education. The Designation is administered by the Center of Fiduciary Studies, the standards-setting body of fi360.

DISCIPLINARY INFORMATION:

Mr. Cook does not have, nor has he ever had any disciplinary disclosure. Clients and prospective clients can view the CRD records (registration records) for Andrew Cook through the SEC’s Investment Adviser Public Disclosure (IAPD) website at www.adviserinfo.sec.gov or FINRA’s Broker Check database online at www.finra.org/brokercheck. The CRD number for Andrew Cook is **6035278**.

OTHER BUSINESS ACTIVITIES:

Mr. Cook does not have any additional business activities.

ADDITIONAL COMPENSATION:

Andrew Cook may not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly to HHM.

SUPERVISION:

Andrew Cook reports to and is supervised by Managing Member, Travis Hutchinson. Travis Hutchinson may be reached at 423-933-1826. Investment and planning recommendations are reviewed during periodic company-wide investment reviews conducted by the Investment Committee. Gina Cook, Chief Compliance Officer, reviews accounts as a whole in conjunction with the quarterly calculation of advisory fees. Gina Cook may be reached at 423-933-1816.

REQUIREMENTS FOR STATE-REGISTERED ADVISERS:

Since HHM is a SEC Registered Investment Advisor, there are no additional disclosures.

Form ADV, Part 2B
Brochure Supplement
For
Jones Krogh

March 7, 2023



HHM Wealth Advisors, LLC

1200 Market Street
Chattanooga, TN 37402
(423) 826-1670
[**jkrogh@hhmwealth.com**](mailto:jkrogh@hhmwealth.com)
[**www.hhmwealth.com**](http://www.hhmwealth.com)

PURPOSE OF THE BROCHURE SUPPLEMENT:

This *BROCHURE SUPPLEMENT* provides information about Jones Krogh that supplements the HHM Wealth Advisors, LLC *FIRM BROCHURE* document. You should have received a copy of the *FIRM BROCHURE*. Please contact Jones Krogh if you did not receive the HHM Wealth Advisors, LLC *FIRM BROCHURE* or if you have any questions about the contents of this *BROCHURE SUPPLEMENT*.

Additional information about Jones Krogh is available on the SEC's website at www.adviserinfo.sec.gov (**CRD number for Jones Krogh is 6188706**).

NOTE:

While HHM Wealth Advisors, LLC may refer to itself as a "registered investment advisor", clients should be aware that registration itself does not imply any level of skill or training.

EDUCATIONAL AND BUSINESS EXPERIENCE:

Jones Krogh

Year of Birth 1984

Education after High School

- University of Georgia – 2007 Bachelor of Business Administration - Accounting
- University of Georgia – 2007 Masters - Accounting

Business Background:

- HHM Wealth Advisors, LLC, 05/2013 – Present
Investment Adviser Representative
- Henderson Hutcherson & McCullough, PLLC – Chattanooga, TN 07/2014-Present
Tax Manager
- Henderson Hutcherson & McCullough, PLLC – Chattanooga, TN 2013-2014
Tax Supervisor
- Henderson Hutcherson & McCullough, PLLC – Chattanooga, TN 2012-2013
Senior Accountant

PROFESSIONAL DESIGNATIONS/CERTIFICATIONS:

Certified Public Accountant (CPA) – States of Georgia & Tennessee

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education requirement typically consist of 150 credit hours with at least a baccalaureate degree with a concentration in accounting; minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of/or verification by a CPA); and successful passage of the Uniform CPA Examination.

In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy has adopted the AICPA's code of Professional Conduct within their state accountancy laws or has created their own.

CERTIFIED FINANCIAL PLANNER™ professional

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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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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*.

Certified Divorce Financial Analyst – (CDFA®)

CDFA professionals provide the client and attorney with data analysis that shows the financial effect of any given settlement. They become part of the divorce team and provide support on financial issues such as:

- Understanding the short-term and long-term effects of dividing property.
- Analyzing pensions and retirement plans.
- Determining if the client can afford the marital home, and if not, what he or she can afford.
- Recognizing the tax consequences of different settlement proposals.

The Institute for Divorce Financial Analysts (IDFA™) is dedicated to the certification, education, and promotion of the use of financial professionals in the divorce arena. Founded in 1993, IDFA provides specialized training to accounting, financial and legal professionals in the field of pre-divorce financial planning, with more than 5000 professionals in the US and Canada.

To acquire the designation, a candidate must successfully pass all divorce financial analyst exams with a minimum score of 70% for each and be in good standing with their FINRA/SEC or other regulatory agency. The designation is available to individuals who have a minimum of three years' experience as a financial professional, accountant or matrimonial attorney; and requires a minimum of 15 divorce-specific hours every two years of continuing education.

DISCIPLINARY INFORMATION:

Mr. Krogh does not have, nor has he ever had any disciplinary disclosure. Clients and prospective clients can view the CRD records (registration records) for Jones Krogh through the SEC's Investment Adviser Public Disclosure (IAPD) website at www.adviserinfo.sec.gov or FINRA's Broker Check database online at www.finra.org/brokercheck. The CRD number for Jones Krogh is 6188706.

OTHER BUSINESS ACTIVITIES:

In addition to Financial Advisory work, Mr. Krogh provides tax services to Henderson, Hutcherson & McCullough, as a Tax Manager focusing on tax planning and tax return preparation based upon an operating agreement between the two firms.

Jones Krogh is licensed as an independent insurance agent in Tennessee, Georgia, Virginia, and Florida.

Jones Krogh as an IA Rep of HHM may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients. When such recommendations or sales are made, a conflict of interest exists as Jones Krogh may earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. HHM requires that Jones Krogh disclose this conflict of interest when such recommendations are made. As a precaution to minimizing conflicts of interest, HHM requires that any commission earned on the sale of such insurance products be assigned to HHM. Also, HHM requires Jones Krogh to disclose that advisory clients may purchase recommended insurance products from other insurance agents not affiliated with HHM.

ADDITIONAL COMPENSATION:

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SUPERVISION:

Jones Krogh reports to and is supervised by Managing Member, Travis Hutchinson. Travis Hutchinson may be reached at 423-933-1826.

Planning and Investment recommendations are further reviewed during periodic company-wide investment reviews conducted by the Investment Committee. Gina Cook, Chief Compliance Officer, reviews accounts as a whole in conjunction with the quarterly calculation of advisory fees. Gina Cook may be reached at 423-933-1816.

REQUIREMENTS FOR STATE-REGISTERED ADVISERS:

Since HHM is a SEC Registered Investment Advisor, there are no additional disclosures.

**Form ADV, Part 2B
Brochure Supplement
For
Christopher J. Sislo**

March 07, 2023



HHM Wealth Advisors, LLC

**1200 Market Street
Chattanooga, TN 37402
(423) 826-1670
csislo@hbmwealth.com
www.hbmwealth.com**

PURPOSE OF THE BROCHURE SUPPLEMENT:

This *BROCHURE SUPPLEMENT* provides information about Christopher J. Sislo that supplements the HHM Wealth Advisors, LLC *FIRM BROCHURE* document. You should have received a copy of the *FIRM BROCHURE*. Please contact Chris Sislo if you did not receive the HHM Wealth Advisors, LLC *FIRM BROCHURE* or if you have any questions about the contents of this *BROCHURE SUPPLEMENT*.

Additional information about Christopher J. Sislo is available on the SEC's website at www.adviserinfo.sec.gov (**CRD number for Chris Sislo is 6149652**).

NOTE:

While HHM Wealth Advisors, LLC may refer to itself as a "registered investment advisor", clients should be aware that registration itself does not imply any level of skill or training.

EDUCATIONAL AND BUSINESS EXPERIENCE:

Christopher J. Sislo

Year of Birth 1983

Education after High School

- Master of Business Administration – University of Alaska-Fairbanks
Fairbanks, AK 2012
- B.S. Business Administration & Economics – University of Wisconsin-Superior
Superior, WI 2007

Business Background:

- HHM Wealth Advisors, LLC, Chattanooga, TN 08/2015 – Present
Investment Advisor Representative
- Edward Jones Investments, Superior, WI 2013 – 2015
Financial Advisor

PROFESSIONAL DESIGNATIONS/CERTIFICATIONS:

CERTIFIED FINANCIAL PLANNER™ professional

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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*.

CHARTED SPECIAL NEEDS CONSULTANT®(ChSNC®)

The Chartered Special Needs Consultant designation provides financial professional with unique technical and quantitative skills necessary to assist clients with special needs. A ChSNC can navigate the unique considerations, estate planning, special needs trusts, life insurance, tax deductions, healthcare issues, Medicaid complexities, and emotional aspects of providing for a loved one with a disability.

Requirements include:

- At least five years of professional experience in financial services or the practice of law
- Four years of professional services experience and an undergraduate degree
- ChSNC designees must adhere to the American College of Financial Services Code of Ethics and comply with the College’s Professional Recertification Program.

DISCIPLINARY INFORMATION:

Mr. Sislo does not have, nor has he ever had any disciplinary disclosure. Clients and prospective clients can view the CRD records (registration records) for Christopher J. Sislo through the SEC’s Investment Adviser Public Disclosure (IAPD) website at www.adviserinfo.sec.gov or FINRA’s Broker Check database online at www.finra.org/brokercheck. The CRD number for Chris Sislo is 6149652.

OTHER BUSINESS ACTIVITIES:

In addition to Financial Advisory work, Mr. Sislo provides tax preparation services to Henderson, Hutcherson & McCullough based upon an operating agreement between the two firms.

Mr. Sislo is licensed as an independent insurance agent in Tennessee.

Chris Sislo, as an Investment Advisor Representative of HHM Wealth, may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients. When such recommendations or sales are made, a conflict of interest exists as Chris Sislo may earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. HHM requires that Chris Sislo disclose this conflict of interest when such recommendations are made. As a precaution to minimizing conflicts of interest, HHM requires that any commission earned on the sale of such insurance products be assigned to HHM. Also, HHM requires Chris Sislo to disclose that advisory clients may purchase recommended insurance products from other insurance agents not affiliated with HHM.

ADDITIONAL COMPENSATION:

Chris Sislo may not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly to HHM Wealth Advisors, LLC.

SUPERVISION:

Chris Sislo reports to and is supervised by Managing Member, Travis Hutchinson. Travis Hutchinson may be reached at 423-933-1826. Investment and planning recommendations are reviewed during periodic company-wide investment reviews conducted by the Investment Committee. Gina Cook, Chief Compliance Officer, reviews accounts as a whole in conjunction with the quarterly calculation of advisory fees. Gina Cook may be reached at 423-933-1816.

REQUIREMENTS FOR STATE-REGISTERED ADVISERS:

Since HHM is a SEC Registered Investment Advisor, there are no additional disclosures.

**Form ADV, Part 2B
Brochure Supplement
For
Joshua W. Cropp**

March 07, 2023



HHM Wealth Advisors, LLC

**1200 Market Street
Chattanooga, TN 37402
(423) 826-1670
jcropp@hbmwealth.com
www.hbmwealth.com**

PURPOSE OF THE BROCHURE SUPPLEMENT:

This *BROCHURE SUPPLEMENT* provides information about Joshua Cropp that supplements the HHM Wealth Advisors, LLC *FIRM BROCHURE* document. You should have received a copy of the *FIRM BROCHURE*. Please contact Joshua Cropp if you did not receive the HHM Wealth Advisors, LLC *FIRM BROCHURE* or if you have any questions about the contents of this *BROCHURE SUPPLEMENT*.

Additional information about Joshua Cropp is available on the SEC's website at www.adviserinfo.sec.gov (CRD number for Joshua Cropp is 5704984).

NOTE:

While HHM Wealth Advisors, LLC may refer to itself as a "registered investment advisor", clients should be aware that registration itself does not imply any level of skill or training.

EDUCATIONAL AND BUSINESS EXPERIENCE:

Joshua W. Cropp

Year of Birth 1983

Education after High School

- Auburn University – Auburn, AL 2007

Business Background:

- HHM Wealth Advisors, LLC, Chattanooga, TN 05/2017 – Present
Investment Adviser Representative
- UBS Financial Services, Chattanooga, TN 02/2014 – 05/2017
Client Service Administration
- Wells Fargo Mortgage, Chattanooga, TN 02/2012 – 12/2013
Mortgage Loan Originator

PROFESSIONAL DESIGNATIONS/CERTIFICATIONS:

CERTIFIED FINANCIAL PLANNER™ professional

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I 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.

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*.

DISCIPLINARY INFORMATION:

Mr. Cropp does not have, nor has he ever had any disciplinary disclosure. Clients and prospective clients can view the CRD records (registration records) for Josh Cropp through the SEC’s Investment Adviser Public Disclosure (IAPD) website at www.adviserinfo.sec.gov or FINRA’s Broker Check database online at www.finra.org/brokercheck. The CRD number for Josh Cropp is 5704984.

OTHER BUSINESS ACTIVITIES:

In addition to Financial Advisory work, Mr. Cropp provides tax preparation services to Henderson, Hutcherson & McCullough based upon an operating agreement between the two firms.

Mr. Cropp is licensed as an independent insurance agent in Tennessee and Mississippi.

Joshua Cropp as an Investment Advisory Representative of HHM may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients. When such recommendations or sales are made, a conflict of interest exists as Joshua Cropp may earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. HHM requires that Joshua Cropp disclose this conflict of interest when such recommendations are made. As a precaution to minimizing conflicts of interest, HHM requires that any commission earned on the sale of such insurance products be assigned to HHM. Also HHM requires Joshua

Cropp to disclose that advisory clients may purchase recommended insurance products from other insurance agents not affiliated with HHM.

ADDITIONAL COMPENSATION:

Joshua Cropp may not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly to HHM Wealth Advisors, LLC.

SUPERVISION:

Joshua Cropp reports to and is supervised by Managing Member, Travis Hutchinson. Travis Hutchinson may be reached at 423-933-1826. Investment and planning recommendations are further reviewed during periodic company-wide investment reviews conducted by the Investment Committee. Gina Cook, Chief Compliance Officer, reviews accounts as a whole in conjunction with the quarterly calculation of advisory fees. Gina Cook may be reached at 423-933-1816.

REQUIREMENTS FOR STATE-REGISTERED ADVISERS:

Since HHM is a SEC Registered Investment Advisor, there are no additional disclosures.

Form ADV, Part 2B
Brochure Supplement
For
Jacob Brown

March 07, 2023



HHM Wealth Advisors, LLC

**1200 Market Street
Chattanooga, TN 37402
(423) 826-1670**

**jbrown@hbmwealth.com
www.hbmwealth.com**

PURPOSE OF THE BROCHURE SUPPLEMENT:

This *BROCHURE SUPPLEMENT* provides information about Jacob Brown that supplements the HHM Wealth Advisors, LLC *FIRM BROCHURE* document. You should have received a copy of the *FIRM BROCHURE*. Please contact Jacob Brown if you did not receive the HHM Wealth Advisors, LLC *FIRM BROCHURE* or if you have any questions about the contents of this *BROCHURE SUPPLEMENT*.

Additional information about Jacob Brown is available on the SEC's website at www.adviserinfo.sec.gov (CRD number for Jacob Brown is 7079234).

NOTE:

While HHM Wealth Advisors, LLC may refer to itself as a "registered investment advisor", clients should be aware that registration itself does not imply any level of skill or training.

EDUCATIONAL AND BUSINESS EXPERIENCE:

Jacob Brown

Year of Birth 1997

Education after High School

- Lee University – Cleveland, TN
2018 – B.S. College of Business - Finance

Business Background:

- HHM Wealth Advisors, LLC, Chattanooga, TN 01/2019 – Present
Investment Adviser Representative
- Lee University – Cleveland, TN 08/2015 – 12/2018
Full Time Student
- Gulchetto Enterprises, LLC Nashville, TN 05/2016 – 08/2016
Real Estate Intern
- Isaiah 58, LLC Nashville, TN 05/2015 – 08/2015
Lawn Care – Part Time
- Christ Presbyterian Academy Nashville, TN 01/2012 – 05/2015
High School Student

PROFESSIONAL DESIGNATIONS/CERTIFICATIONS:

Mr. Brown does not hold and professional designations or certifications.

DISCIPLINARY INFORMATION:

Mr. Brown does not have, nor has he ever had any disciplinary disclosure. Clients and prospective clients can view the CRD records (registration records) for Jacob Brown through the SEC's Investment Adviser Public Disclosure (IAPD) website at www.adviserinfo.sec.gov or FINRA's Broker Check database online at www.finra.org/brokercheck. The CRD number for Jacob Brown is 7079234.

OTHER BUSINESS ACTIVITIES:

In addition to Financial Advisory work, Mr. Brown provides tax preparation services to Henderson, Hutcherson & McCullough based upon an operating agreement between the two firms.

Mr. Brown is a member of Kind Properties, LLC, a residential rental property firm located in Chattanooga, TN. Mr. Brown is not involved in day to day activities or management.

Mr. Brown is licensed as an independent insurance agent in Tennessee. Mr. Brown, as an Investment Adviser Representative of HHM, may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients.

When such recommendations or sales are made, a conflict of interest exists as Jacob Brown may earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. HHM requires that Jacob Brown disclose this conflict of interest when such recommendations are made. As a precaution to minimizing conflicts of interest, HHM requires that any commission earned on the sale of such insurance products be assigned to HHM. Also, HHM requires Jacob Brown to disclose that advisory clients may purchase recommended insurance products from other insurance agents not affiliated with HHM.

ADDITIONAL COMPENSATION:

Jacob Brown may not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly to HHM.

SUPERVISION:

Jacob Brown reports to and is supervised by Managing Member, Travis Hutchinson. All levels of service offered by HHM and all security recommendations are reviewed by Travis Hutchinson. Travis Hutchinson may be reached at 423-933-1826. Investment and planning recommendations are further reviewed during periodic company-wide investment reviews conducted by the Investment Committee. Gina Cook, Chief Compliance Officer, reviews accounts as a whole in conjunction with the quarterly calculation of advisory fees. Gina Cook may be reached at 423-933-1816.

REQUIREMENTS FOR STATE-REGISTERED ADVISERS:

Since HHM is a SEC Registered Investment Advisor, there are no additional disclosures.

Form ADV, Part 2B
Brochure Supplement
For
John Dunham

March 7, 2023



HHM Wealth Advisors, LLC

**1200 Market Street
Chattanooga, TN 37402
(423) 826-1670**

**jdunham@hbmwealth.com
www.hbmwealth.com**

PURPOSE OF THE BROCHURE SUPPLEMENT:

This *BROCHURE SUPPLEMENT* provides information about John Dunham that supplements the HHM Wealth Advisors, LLC *FIRM BROCHURE* document. You should have received a copy of the *FIRM BROCHURE*. Please contact John Dunham if you did not receive the HHM Wealth Advisors, LLC *FIRM BROCHURE* or if you have any questions about the contents of this *BROCHURE SUPPLEMENT*.

Additional information about John Dunham is available on the SEC's website at www.adviserinfo.sec.gov (**CRD number for John Dunham is 7187056**).

NOTE:

While HHM Wealth Advisors, LLC may refer to itself as a "registered investment advisor", clients should be aware that registration itself does not imply any level of skill or training.

EDUCATIONAL AND BUSINESS EXPERIENCE:

John Dunham

Year of Birth 1997

Education after High School

- University of Tennessee at Chattanooga – Chattanooga, TN
2019 – B.S. College of Business – Finance
- Louisiana State University at Shreveport – Shreveport, LA
2021 – Master of Business Administration

Business Background:

- HHM Wealth Advisors, LLC, Chattanooga, TN 05/2019 – Present
Investment Adviser Representative
- University of TN at Chattanooga – Chattanooga, TN 07/2015 – 05/2019
Full Time Student
- Henderson, Hutcherson & McCullough PLLC, Chattanooga, TN 01/2019–04/2019
Intern
- Amazon, Chattanooga, TN 06/2018 – 12/2018
Warehouse Associate
- Todd Henon Properties Chattanooga, TN 10/2016 – 06/2018
Marketing Assistant
- Spring Creek Ranch, Collierville, TN 05/2016 – 08/2016
Golf Staff
- Collierville High School & Middle School 08/2008 – 05/2015
Full Time Student
- Little Caesar's Collierville, TN 02/2013 – 04/2013
Staff

PROFESSIONAL DESIGNATIONS/CERTIFICATIONS:

Mr. Dunham does not hold any professional designations or certifications.

DISCIPLINARY INFORMATION:

Mr. Dunham does not have, nor has he ever had any disciplinary disclosure. Clients and prospective clients can view the CRD records (registration records) for John Dunham through the SEC's Investment Adviser Public Disclosure (IAPD) website at www.adviserinfo.sec.gov or FINRA's Broker Check database online at www.finra.org/brokercheck. The CRD number for John Dunham is 7187056.

OTHER BUSINESS ACTIVITIES:

In addition to Financial Advisory work, Mr. Dunham provides tax preparation services to Henderson, Hutcherson & McCullough based upon an operating agreement between the two firms.

Mr. Dunham is licensed as an independent insurance agent in Tennessee. Mr. Dunham, as an Investment Advisor Representative of HHM Wealth Advisors, may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients.

When such recommendations or sales are made, a conflict of interest exists as John Dunham may earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. HHM Wealth Advisors requires that Mr. Dunham disclose this conflict of interest when such recommendations are made. As a precaution to minimizing conflicts of interest, HHM Wealth Advisors requires that any commission earned on the sale of such insurance products be assigned to HHM Wealth Advisors. Also, HHM Wealth Advisors requires John Dunham to disclose that advisory clients may purchase recommended insurance products from other insurance agents not affiliated with HHM Wealth Advisors.

ADDITIONAL COMPENSATION:

John Dunham may not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly to HHM.

SUPERVISION:

John Dunham reports to and is supervised by Managing Member, Travis Hutchinson. All levels of service offered by HHM and all security recommendations are reviewed by Travis Hutchinson. Travis Hutchinson may be reached at 423-933-1826. Investment and planning recommendations are further reviewed during periodic company-wide investment reviews conducted by the Investment Committee. Gina Cook, Chief Compliance Officer, reviews accounts as a whole in conjunction with the quarterly calculation of advisory fees. Gina Cook may be reached at 423-933-1816.

REQUIREMENTS FOR STATE-REGISTERED ADVISERS:

Since HHM is a SEC Registered Investment Advisor, there are no additional disclosures.

Form ADV, Part 2B
Brochure Supplement
For
Bailey Howard

March 7, 2023



HHM Wealth Advisors, LLC

**1200 Market Street
Chattanooga, TN 37402
(423) 826-1670**

**bhoward@hbmwealth.com
www.hbmwealth.com**

PURPOSE OF THE BROCHURE SUPPLEMENT:

This *BROCHURE SUPPLEMENT* provides information about Bailey Howard that supplements the HHM Wealth Advisors, LLC *FIRM BROCHURE* document. You should have received a copy of the *FIRM BROCHURE*. Please contact Bailey Howard if you did not receive the HHM Wealth Advisors, LLC *FIRM BROCHURE* or if you have any questions about the contents of this *BROCHURE SUPPLEMENT*.

Additional information about Bailey Howard is available on the SEC's website at www.adviserinfo.sec.gov (**CRD number for Bailey Howard is 7516072**).

NOTE:

While HHM Wealth Advisors, LLC may refer to itself as a "Registered Investment Advisor", clients should be aware that registration itself does not imply any level of skill or training.

EDUCATIONAL AND BUSINESS EXPERIENCE:

Bailey Howard

Year of Birth 1998

Education after High School

- University of Tennessee at Chattanooga – Chattanooga, TN
2021 – B.S. College of Business - Finance

Business Background:

- HHM Wealth Advisors, LLC, Chattanooga, TN 03/2022 – Present
Investment Adviser Representative
- HHM Wealth Advisors, LLC, Chattanooga, TN 01/2022 – 03/2022
Client Service Administrator
- The Peach Brothers, Nashville, TN 01/2020 – 01/2022
- The Peach Truck, Nashville, TN 08/2016 – 01/2020
- Lasaters, Mt. Juliet, TN 01/2016 – 08/2016
- Chuck E Cheese, Mt. Juliet, TN 01/2015 – 01/2016
- Student, Mt. Juliet, TN 08/2009 – 05/2016

PROFESSIONAL DESIGNATIONS/CERTIFICATIONS:

Mr. Howard does not hold any professional designations or certifications.

DISCIPLINARY INFORMATION:

Mr. Howard does not have, nor has he ever had any disciplinary disclosure. Clients and prospective clients can view the CRD records (registration records) for Bailey Howard through the SEC's Investment Adviser Public Disclosure (IAPD) website at www.adviserinfo.sec.gov or FINRA's Broker Check database online at www.finra.org/brokercheck. The CRD number for Bailey Howard is 7516072.

OTHER BUSINESS ACTIVITIES:

In addition to Financial Advisory work, Mr. Howard provides tax preparation services to Henderson, Hutcherson & McCullough, PLLC based upon an operating agreement between the two firms.

Mr. Howard is licensed as an independent insurance agent in Tennessee. Mr. Howard, as an Investment Adviser Representative of HHM Wealth Advisors, may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients.

When such recommendations or sales are made, a conflict of interest exists as Bailey Howard may earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. HHM Wealth Advisors requires that Mr. Howard disclose this conflict of interest when such recommendations are made. As a precaution to minimizing conflicts of interest, HHM Wealth Advisors requires that any commission earned on the sale of

such insurance products be assigned to HHM Wealth Advisors. Also, HHM Wealth Advisors requires Bailey Howard to disclose that advisory clients may purchase recommended insurance products from other insurance agents not affiliated with HHM Wealth Advisors.

ADDITIONAL COMPENSATION:

Bailey Howard may not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly to HHM Wealth Advisors.

SUPERVISION:

Bailey Howard reports to and is supervised by Managing Member, Travis Hutchinson. All levels of service offered by HHM and all security recommendations are reviewed by Travis Hutchinson. Travis Hutchinson may be reached at 423-933-1826. Investment and planning recommendations are further reviewed during periodic company-wide investment reviews conducted by the Investment Committee. Gina Cook, Chief Compliance Officer, reviews accounts in conjunction with the quarterly calculation of advisory fees. Gina Cook may be reached at 423-933-1816.

REQUIREMENTS FOR STATE-REGISTERED ADVISERS:

Since HHM Wealth Advisors is a SEC Registered Investment Advisor, there are no additional disclosures.

Form ADV, Part 2B
Brochure Supplement
For
Matthew Thurman

March 7, 2023



HHM Wealth Advisors, LLC

1200 Market Street
Chattanooga, TN 37402
(423) 826-1670

[**mthurman@hbmwealth.com**](mailto:mthurman@hbmwealth.com)
[**www.hbmwealth.com**](http://www.hbmwealth.com)

PURPOSE OF THE BROCHURE SUPPLEMENT:

This *BROCHURE SUPPLEMENT* provides information about Jamie McLean that supplements the HHM Wealth Advisors, LLC *FIRM BROCHURE* document. You should have received a copy of the *FIRM BROCHURE*. Please contact Jamie McLean if you did not receive the HHM Wealth Advisors, LLC *FIRM BROCHURE* or if you have any questions about the contents of this *BROCHURE SUPPLEMENT*.

Additional information about Matthew Thurman is available on the SEC's website at www.adviserinfo.sec.gov (**CRD number for Christopher Matthew Thurman is 7629951**).

NOTE:

While HHM Wealth Advisors, LLC may refer to itself as a "registered investment advisor", clients should be aware that registration itself does not imply any level of skill or training.

EDUCATIONAL AND BUSINESS EXPERIENCE:

Matthew Thurman

Year of Birth 1996

Education after High School

- Lee University – Cleveland, TN
2018 – Bachelor of Business Administration - Accounting

Business Background:

- HHM Wealth Advisors, LLC, Chattanooga, TN 10/2022 – Present
Investment Adviser Representative
- Henderson, Hutcherson, McCullough PLLC– Chattanooga, TN 01/2018 – 08/2022
Tax Supervisor, Certified Public Accountant (CPA)
- Full Time Student 09/2012 – 12/2017

PROFESSIONAL DESIGNATIONS/CERTIFICATIONS:

Certified Public Accountant (CPA) – State of Tennessee

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education requirement typically consist of 150 credit hours with at least a baccalaureate degree with a concentration in accounting; minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of/or verification by a CPA); and successful passage of the Uniform CPA Examination.

In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy has adopted the AICPA's code of Professional Conduct within their state accountancy laws or has created their own.

DISCIPLINARY INFORMATION:

Mr. Thurman does not have, nor has he ever had any disciplinary disclosure. Clients and prospective clients can view the CRD records (registration records) for Matthew Thurman through the SEC's Investment Adviser Public Disclosure (IAPD) website at www.adviserinfo.sec.gov or FINRA's Broker Check database online at www.finra.org/brokercheck. The CRD number for Matthew Thurman is 7629951.

OTHER BUSINESS ACTIVITIES:

In addition to Financial Advisory work, Mr. Thurman provides tax preparation services to Henderson, Hutcherson & McCullough based upon an operating agreement between the two firms.

ADDITIONAL COMPENSATION:

Matthew Thurman may not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly to HHM.

SUPERVISION:

Matthew reports to and is supervised by Managing Member, Travis Hutchinson. All levels of service offered by HHM and all security recommendations are reviewed by Travis Hutchinson. Travis Hutchinson may be reached at 423-933-1826. Investment and planning recommendations are further reviewed during periodic company-wide investment reviews conducted by the Investment Committee. Gina Cook, Chief Compliance Officer, reviews accounts as a whole in conjunction with the quarterly calculation of advisory fees. Gina Cook may be reached at 423-933-1816.

REQUIREMENTS FOR STATE-REGISTERED ADVISERS:

Since HHM is a SEC Registered Investment Advisor, there are no additional disclosures.

Form ADV, Part 2B
Brochure Supplement
For
Jamie McLean

May 15, 2023



HHM Wealth Advisors, LLC

**1200 Market Street
Chattanooga, TN 37402
(423) 826-1670**

**jmclean@hbmwealth.com
www.hbmwealth.com**

PURPOSE OF THE BROCHURE SUPPLEMENT:

This *BROCHURE SUPPLEMENT* provides information about Jamie McLean that supplements the HHM Wealth Advisors, LLC *FIRM BROCHURE* document. You should have received a copy of the *FIRM BROCHURE*. Please contact Jamie McLean if you did not receive the HHM Wealth Advisors, LLC *FIRM BROCHURE* or if you have any questions about the contents of this *BROCHURE SUPPLEMENT*.

Additional information about Jamie McLean is available on the SEC's website at www.adviserinfo.sec.gov (**CRD number for Robert James McLean is 7589923**).

NOTE:

While HHM Wealth Advisors, LLC may refer to itself as a "registered investment advisor", clients should be aware that registration itself does not imply any level of skill or training.

EDUCATIONAL AND BUSINESS EXPERIENCE:

Jamie McLean

Year of Birth 1991

Education after High School

- University of Tennessee at Chattanooga – Chattanooga, TN
2022 – Master of Business Administration, Finance
- Georgia Southern University – Statesboro, GA
2014 – Bachelor of Arts, Political Science

Business Background:

- HHM Wealth Advisors, LLC, Chattanooga, TN 05/2022 – Present
Investment Adviser Representative
- University of TN at Chattanooga – Chattanooga, TN 11/2015 – 05/2022
Coordinator of Intramurals & Sports Complex
- Clemson University – Clemson, SC 08/2014 – 08/2016
Graduate Assistant
- Georgia Southern University, Statesboro, GA 08/2009 – 08/2014
Full Time Student,
- Georgia Southern University, Statesboro, GA 08/2009 – 08/2014
Campus Recreation and Intramurals - Program Assistant

PROFESSIONAL DESIGNATIONS/CERTIFICATIONS:

Mr. McLean does not hold any professional designations or certifications.

DISCIPLINARY INFORMATION:

Mr. McLean does not have, nor has he ever had any disciplinary disclosure. Clients and prospective clients can view the CRD records (registration records) for Jamie McLean through the SEC's Investment Adviser Public Disclosure (IAPD) website at www.adviserinfo.sec.gov or FINRA's Broker Check database online at www.finra.org/brokercheck. The CRD number for Jamie McLean is 7589923.

OTHER BUSINESS ACTIVITIES:

In addition to Financial Advisory work, Mr. McLean provides tax preparation services to Henderson, Hutcherson & McCullough based upon an operating agreement between the two firms.

Mr. McLean is licensed as an independent insurance agent in Tennessee. Mr. McLean, as an Investment Advisor Representative of HHM Wealth Advisors, may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients.

When such recommendations or sales are made, a conflict of interest exists as Jamie McLean may earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. HHM Wealth Advisors requires that Mr. McLean disclose this conflict of interest when such recommendations are made. As a precaution to minimizing conflicts of interest, HHM Wealth Advisors requires that any commission earned on the sale of such insurance products be assigned to HHM Wealth Advisors. Also, HHM Wealth Advisors requires Jamie McLean to disclose that advisory clients may purchase recommended insurance products from other insurance agents not affiliated with HHM Wealth Advisors.

Mr. McLean serves as a part-time football and basketball official for NCAA, GHSA, and TSSAA September thru February.

ADDITIONAL COMPENSATION:

Jamie McLean may not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly to HHM.

SUPERVISION:

Jamie McLean reports to and is supervised by Managing Member, Travis Hutchinson. All levels of service offered by HHM and all security recommendations are reviewed by Travis Hutchinson. Travis Hutchinson may be reached at 423-933-1826. Investment and planning recommendations are further reviewed during periodic company-wide investment reviews conducted by the Investment Committee. Gina Cook, Chief Compliance Officer, reviews accounts as a whole in conjunction with the quarterly calculation of advisory fees. Gina Cook may be reached at 423-933-1816.

REQUIREMENTS FOR STATE-REGISTERED ADVISERS:

Since HHM is a SEC Registered Investment Advisor, there are no additional disclosures.