

## **Andrew Lamb**

**Financial Advisor**

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330.836.3805



This Brochure Supplement provides information about **Andrew Lamb**, which supplements the W3 Wealth Advisors, LLC ("W3") Form ADV Part 2A Brochure. Please inform Andrew Lamb 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 Andrew Lamb 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)

### **Educational Background and Business Experience**

**Date of Birth:** 10/18/1990

#### **Education:**

- The University of Akron, BS – Organizational Leadership– 2014

#### **Examinations and Professional Designations:**

- Series 7 – General Securities Representative
- Series 66 – Investment Advisory Representative
- Ohio Life and Health

#### **Business Experience:**

- Investment Advisor Representative, W3 Wealth Advisors, LLC, July 2019 - Present
- Registered Representative, W3 Wealth Management, June 2019 – Present
- Investment Adviser Representative – Valmark Advisers, Inc, June 2019 – Present
- Registered Representative – Valmark Securities, Inc, June 2019 – Present
- Financial Consultant & Advisor – Wells Fargo Advisors – August 2014 – June 2019
- Operation Clerk – Wells Fargo Advisors – May 2012 – August 2014

## Part 2 B of ADV-Brochure Supplements

### **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. Andrew Lamb has no disciplinary record that would impact a client's evaluation of the practice.

### **Other Business Activities**

Andrew Lamb is an Investment Advisory representative of Valmark Advisers, Inc. As an investment advisor representative of Valmark Advisers, Andrew Lamb is eligible to receive advisory fees associated with work performed for customers of that Advisory firm. These fees are separate from fees earned for work with W3 Wealth Advisors LLC.

Andrew Lamb 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 Valmark Securities, Inc., Andrew Lamb is eligible to receive normal commissions associated with securities sales.

Andrew Lamb is an insurance agent affiliated with Executive Insurance Agency, Inc., an agency under common ownership and management of Valmark Advisers, Inc. Andrew Lamb is also eligible to receive insurance commissions surrounding the sales of insurance products sold through 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](mailto:Frank2@W3Wealth.com) to discuss questions or concerns in connection with the internal compliance program.

### **Information for State Registered Advisors**

Andrew Lamb has no additional information to disclose.