# Frank & Kraft Wealth Coaching, Inc.

# Form ADV Part 2B – Individual Disclosure Brochure

for

# **Brett A. Carlile**

Personal CRD Number: 6605352 Investment Adviser Representative

This brochure supplement provides information about Brett A. Carlile that supplements the Frank & Kraft Wealth Coaching, Inc. brochure. You should have received a copy of that brochure. Please contact Bryan L. Weiss if you did not receive Frank & Kraft Wealth Coaching, Inc.'s brochure or if you have any questions about the contents of this supplement.

Please note that information about investment adviser representatives is not found at the FINRA Broker Check site, because investment adviser representatives are not registered representatives with a broker-dealer. Information on investment adviser representatives is found instead at the SEC's website located at <u>www.adviserinfo.sec.gov.</u>

Additional information about Brett A. Carlile is also available on the SEC's website at <u>www.adviserinfo.sec.gov.</u>

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## Item 2: Education Background and Business Experience

Name: Brett A. Carlile Born: 1973

### **Education:**

Juris Doctorate, Indiana University School of Law - 1999 B.S. Finance, Indiana University - 1996

#### **Business Background:**

2008 - Present	Attorney Frank & Kraft P.C.
2016 - Present	Investment Adviser Representative Frank & Kraft Wealth Coaching, Inc.
1999 - 2008	Senior Associate Attorney Carson Boxberger, LLP

#### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

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

Brett A. Carlile is an attorney with the law firm Frank & Kraft, A Professional Corporation. From time to time, he will offer clients legal advice from this activity. Frank & Kraft Wealth Coaching, Inc. strives to always act in the best interest of the client. Clients are in no way required to utilize the services of Brett A. Carlile of Frank & Kraft, A Professional Corporation in his capacity as a lawyer.

Brett A. Carlile spends a significant amount of time (estimated at more than 80%) working with Frank & Kraft, A Professional Corporation and an insignificant amount of time (estimated at less than 20%) working with Frank & Kraft Wealth Coaching, Inc.

### **Item 5: Additional Compensation**

Brett A. Carlile does not receive any economic benefit from any person, company, or organization, other than legal fees earned from Frank & Kraft, A Professional Corporation and from investment advisory fees earned for providing clients investment advisory services through Frank & Kraft Wealth Coaching, Inc.

### **Item 6: Supervision**

Bryan L. Weiss is a co-owner and co-supervisor of Frank & Kraft Wealth Coaching, Inc., and works closely with co-owner and co-supervisor Paul A. Kraft. All advice provided to clients is reviewed by this co-supervisor prior to implementation. Bryan Weiss can be reached at (317) 888- 9465. Bryan L. Weiss adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.

## Item 7: Requirements for State Registered Advisers

This disclosure is required by Indiana state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.

Brett A. Carlile has a clean insurance, securities and investment adviser background history and therefore he has no disciplinary information on his record pertaining to any licenses and or designations that he has held in the past or currently holds today in Indiana or any other state.

Additional information about Brett A. Carlile is available on the SEC's website at <u>www.adviserinfo.sec.gov.</u>