

**Item 1 Cover Page for Brochure Supplement**

**Jeffrey Myers, CFP®, Owner**  
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**Long Island Wealth Management, Inc.**

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December 31, 2017

**This brochure supplement provides information about Jeffrey Myers, CFP® that supplements the Long Island Wealth Management, Inc. brochure. You should have received a copy of that brochure. Please contact Jeffrey Myers, CFP®, Owner if you did not receive Long Island Wealth Management, Inc.'s brochure or if you have any questions about the contents of this supplement.**

**Additional information about Jeffrey Myers, CFP® is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2 Educational Background and Business Experience

Jeffrey Myers, CFP®, born 1975, graduated from the University of Phoenix with a Bachelor of Arts Degree in Accounting. Mr. Myers is the Owner and Investment Advisor Representative of Long Island Wealth Management, Inc., and Long Island Wealth Management, Inc. DBA Triangle Retirement Solutions. He was an Investment Advisor with Fusion Analytics Securities from July 2010 until February 2016; an Investment Advisor with Comprehensive Asset Management & Servicing, Inc. from March 2010 until July 2010.

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a

Fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Item 3 Disciplinary Information**

There are no legal or disciplinary events or proceedings to report concerning Mr. Myers.

### **Description of a professional attainment, designation, or license being revoked or suspended.**

Not applicable to Mr. Myers.

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

None

**If a relationship between the advisory business and the *supervised person's* other financial industry activities creates a material conflict of interest with *clients*, describe the nature of the conflict and generally how you address it.**

See the response to Item 4 above.

**If the *supervised person* receives commissions, bonuses or other compensation based on the sale of securities or other investment products, including as a broker-dealer or registered representative, and including distribution or service ("trail") fees from the sale of mutual funds, disclose this fact. If this compensation is not cash, explain what type of compensation the *supervised person* receives. Explain that this practice gives the *supervised person* an incentive to recommend investment products based on the compensation received, rather than on the *client's* needs.**

Not applicable to Mr. Myers.

**If the *supervised person* is actively engaged in any business or occupation for compensation not discussed in response to Item 4.A, above, and the other business activity or activities provide a substantial source of the *supervised person's* income or involve a substantial amount of the *supervised person's* time, disclose this fact and describe the nature of that**

**business. If the other business activities represent less than 10 percent of the *supervised person's* time and income, you may presume that they are not substantial.**

Not applicable to Mr. Myers.

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

Mr. Myers does not receive compensation or other economic benefit from anyone for providing advisory services other than what has been described in the LIWM Brochure.

#### **Item 6 Supervision**

Jeffrey Burke is the Chief Compliance Officer of LIWM. He can be reached at (516) 869-4025. He, Jeffrey Myers & Jeffrey Greco are the only individuals that provide investment advice to clients.

#### **Item 7 Requirements for State-Registered Advisers**

Mr. Myers has not been involved in an award or found liable in an arbitration claim, civil, or self-regulatory organization event or administrative proceeding, or been the subject of a bankruptcy petition.

**Item 1 Cover Page for Brochure Supplement**

**Jeffrey Ryan Burke**  
Investment Advisor Representative  
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**Long Island Wealth Management, Inc.**

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**This brochure supplement provides information about Jeffrey Ryan Burke that supplements the Long Island Wealth Management, Inc. brochure. You should have received a copy of that brochure. Please contact Jeffrey Myers, CFP® Owner if you did not receive Long Island Wealth Management, Inc.'s brochure or if you have any questions about the contents of this supplement.**

**Additional information about Jeffrey Ryan Burke is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## **Item 2 Educational Background and Business Experience**

Jeffrey Ryan Burke, born 1981, graduated from Providence College with a Bachelor of Science Degree in Finance and a Minor in Development of Western Civilization. Mr. Burke is an Investment Advisor Representative with Long Island Wealth Management, Inc. Mr. Burke is also dually registered as an Investment Advisor with Blank Equity Management, LLC. He was an Investment Advisor with Fusion Analytics Investment Partners from November 2011 until February 2016; an Investment Advisor with Fidelity Brokerage Services from January 2005 until November 2011.

## **Item 3 Disciplinary Information**

There are no legal or disciplinary events or proceedings to report concerning Mr. Burke.

### **Description of a professional attainment, designation, or license being revoked or suspended.**

Not applicable to Mr. Burke.

## **Item 4 Other Business Activities**

Jeffrey Ryan Burke, Investment Advisor Representative of LIWM is licensed and registered as an insurance agent to sell life insurance, long term care insurance, health insurance and other lines of insurance for various insurance companies. Therefore, he will be able to purchase insurance products for any client in need of such services and will receive separate, yet typical compensation in the form of commissions for the purchase of insurance products. This creates a conflict of interest. A conflict of interest exists because of the receipt of additional compensation by Jeffrey Ryan Burke. Clients are not obligated to use LIWM or Mr. Burke for insurance products services. However, in such instances, there is no advisory fee associated with these insurance products. Jeffrey Ryan Burke will serve as an IAR with Blank Equity Management, an unaffiliated Registered Investment Advisor. This dual registration should not pose any conflicts of interest as no clients from LIWM will be solicited to do business with Blank Equity Management and vice versa. They are two separate RIA's and the clients of each respective business are separate and distinct.

**If a relationship between the advisory business and the *supervised person's* other financial industry activities creates a material conflict of interest with *clients*, describe the nature of the conflict and generally how you address it.**

See the response to Item 4 above.

**If the *supervised person* receives commissions, bonuses or other compensation based on the sale of securities or other investment products, including as a broker-dealer or registered representative, and including distribution or service ("trail") fees from the sale of mutual funds, disclose this fact. If this compensation is not cash, explain what type of compensation the *supervised person* receives. Explain that this practice gives the *supervised person* an incentive to recommend investment products based on the compensation received, rather than on the *client's* needs.**

Not applicable to Mr. Burke.

**If the *supervised person* is actively engaged in any business or occupation for compensation not discussed in response to Item 4.A, above, and the other business activity or activities provide a substantial source of the *supervised person's* income or involve a substantial amount of the *supervised person's* time, disclose this fact and describe the nature of that business. If the other business activities represent less than 10 percent of the *supervised person's* time and income, you may presume that they are not substantial.**

Not applicable to Mr. Burke.

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

Mr. Burke does not receive compensation or other economic benefit from anyone for providing advisory services other than what has been described in the LIWM Brochure.

#### **Item 6 Supervision**

Jeffrey Burke is the Chief Compliance Officer of LIWM. He can be reached at (516) 869-4025. He, Jeffrey Myers and Jeffrey Greco are the only individuals that provide investment advice to clients.

#### **Item 7 Requirements for State-Registered Advisers**

Mr. Burke has not been involved in an award or found liable in an arbitration claim, civil, or self-regulatory organization event or administrative proceeding, or been the subject of a bankruptcy petition.

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**Jeffrey B. Greco**  
Investment Advisor Representative  
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**Long Island Wealth Management, Inc.**

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**This brochure supplement provides information about Jeffrey B. Greco that supplements the Long Island Wealth Management, Inc. brochure. You should have received a copy of that brochure. Please contact Jeffrey Myers, CFP® Owner if you did not receive Long Island Wealth Management, Inc.'s brochure or if you have any questions about the contents of this supplement.**

**Additional information about Jeffrey B. Greco is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## **Item 2 Educational Background and Business Experience**

Jeffrey B. Greco, born 1967, grew up in West Islip, NY and graduated from Hofstra University. Mr. Greco is an Investment Advisor Representative with Long Island Wealth Management, Inc. Jeffrey also owns his own consulting businesses and real estate company, Sovereign Consulting Solutions Inc., Municipal TPA Inc. and JB Greco and Associates, LLC. He was an Investment Advisor with Mass Mutual prior to joining LIWM. Jeffrey also previously worked for American Express and was a former partner in the Greco Planning Group.

## **Item 3 Disciplinary Information**

There are no legal or disciplinary events or proceedings to report concerning Mr. Greco.

### **Description of a professional attainment, designation, or license being revoked or suspended.**

Not applicable to Mr. Greco.

## **Item 4 Other Business Activities**

Jeffrey B. Greco, Investment Advisor Representative of LIWM is licensed and registered as an insurance agent to sell life insurance, long term care insurance, health insurance and other lines of insurance for various insurance companies. Therefore, he will be able to purchase insurance products for any client in need of such services and will receive separate, yet typical compensation in the form of commissions for the purchase of insurance products. This creates a conflict of interest. A conflict of interest exists because of the receipt of additional compensation by Jeffrey B. Greco. Clients are not obligated to use LIWM or Mr. Greco for insurance products services. However, in such instances, there is no advisory fee associated with these insurance products. Jeffrey is also a general business consultant and operates Sovereign Consulting Solutions Inc. to assist in improving business operations, similarly, Jeffrey owns Municipal TPA Inc. assisting in Municipal Consulting Services. Lastly, Jeffrey owns JB Greco & Associates, a Real Estate Entity that is subleasing office space at 500 Express Drive South, Brentwood, NY 11717. No conflicts of interest are anticipated at all from these other three businesses because clients of LIWM are not to be solicited by these businesses.

**If a relationship between the advisory business and the *supervised person's* other financial industry activities creates a material conflict of interest with *clients*, describe the nature of the conflict and generally how you address it.**

See the response to Item 4 above.

**If the *supervised person* receives commissions, bonuses or other compensation based on the sale of securities or other investment products, including as a broker-dealer or registered representative, and including distribution or service (“trail”) fees from the sale of mutual funds, disclose this fact. If this compensation is not cash, explain what type of compensation the *supervised person* receives. Explain that this practice gives the *supervised person* an incentive to recommend investment products based on the compensation received, rather than on the *client's* needs.**

Not applicable to Mr. Greco.

**If the *supervised person* is actively engaged in any business or occupation for compensation not discussed in response to Item 4.A, above, and the other business activity or activities provide a substantial source of the *supervised person's* income or involve a substantial amount of the *supervised person's* time, disclose this fact and describe the nature of that business. If the other business activities represent less than 10 percent of the *supervised person's* time and income, you may presume that they are not substantial.**

Not applicable to Mr. Greco.

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

Mr. Greco does not receive compensation or other economic benefit from anyone for providing advisory services other than what has been described in the LIWM Brochure.

#### **Item 6 Supervision**

Jeffrey Ryan Burke is the Chief Compliance Officer of LIWM. He can be reached at (516) 869-4025. He, Jeffrey Myers and Jeffrey Greco are the only individuals that provide investment advice to clients.

#### **Item 7 Requirements for State-Registered Advisers**

Mr. Greco has not been involved in an award or found liable in an arbitration claim, civil, or self-regulatory organization event or administrative proceeding, or been the subject of a bankruptcy petition.