



Form ADV Part 2B: Brochure Supplement

January 27, 2023

This brochure supplement provides information about CI RegentAtlantic Private Wealth's supervised persons that supplements CI Private Wealth, LLC's brochure. You should have received a copy of that brochure. Please contact Larry Nakamura, Chief Compliance Officer, at (305) 781-3040 or lnakamura@ci.com if you did not receive CI Private Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about CI RegentAtlantic Private Wealth's supervised persons is available on the SEC's website at www.adviserinfo.sec.gov.

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973-425-8420

TABLE OF CONTENTS

JOHN BECK (Born 1994).....	4
J. BRENT BEENE (Born 1976).....	7
BARBARA C. BILELLO (Born 1972).....	11
JEFFREY BOYER (Born 1978).....	14
JAMES CIPRICH (Born 1973).....	18
ALEX CORIDDI (Born 1992).....	25
LESLEY DRAPER (Born 1971).....	29
IAN HARVEY (Born 1990).....	33
MATTHEW HOLDEN (Born 1989).....	37
BRENDAN HUGHES (Born 1991).....	40
ANDREW KAPYRIN (Born 1983).....	44
BRIAN KAZANCHY (Born 1978).....	47
MICHAEL J. KLINGER (Born 1993).....	51
DILAN KLUGE (Born 1994).....	55
GERALD M. KOREY (Born 1988).....	58
KYLE KRATOCHVIL (Born 1998).....	62
RYAN KUNG (Born 1995).....	65
JAMES F. MADDEN (Born 1964).....	68
MATTHEW MASTERSON (Born 1986).....	71
MATT MIGNON (Born 1992).....	76
ZACHARY MORSE (Born 1992).....	81
LISA NEIRA (Born 1986).....	84
JANE P. NEWTON (Born 1959).....	88
MATTHEW OGUS (Born 1996).....	92
CHADDERDON W. O'BRIEN (Born 1984).....	95
PETER O'NEILL (Born 1987).....	99
R. DAVID PETTIT (Born 1988).....	103
CHRISTOPHER PICCOLI (Born 1986).....	107
NIKO PICCOLO (Born: 1999).....	112
PAUL PLATKIN (Born: 1966).....	115
JAMES W. REILLY (Born 1966).....	118

ABIGAIL ROSEN (Born 1977)	122
SAGAR SHAH (Born 1987)	126
BRYAN D. SMALLEY (Born 1983)	129
JAMES R. SONNEBORN (Born 1959)	133
WILLIAM C. VAUGHAN (Born 1993)	137
MELISSA WEISZ (Born 1983)	141

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

John Beck

December 5, 2022

This brochure supplement provides information about John Beck that supplements CI Private Wealth, LLC brochure. You should have received a copy of that brochure. Please contact Larry Nakamura, Chief Compliance Officer, at (305) 781-3040 or lnakamura@ci.com if you did not receive CI Private Wealth, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about John Beck is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
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Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

JOHN BECK (BORN: 1994)

Educational Background:

- Washington College, BA, 2016

Business Background:

- CI RegentAtlantic Private Wealth, Associate Wealth Advisor, 12/2022 to Present
- RegentAtlantic, Associate Wealth Advisor 03/2022 to Present
- TIAA, Advisor Consultant II, 01/2019 to 03/2022
- Merrill Lynch Wealth Management, 11/2017 to 01/2019
- Black River Wealth Management, Financial Advisor, 06/2016 to 11/2017
- No prior business background in the past five years other than what is listed above

ITEM 3 - DISCIPLINARY INFORMATION

John Beck does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

John Beck is not actively engaged in any investment related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

John Beck does not receive an economic benefit for providing advisory services from a non-client.

John is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy

and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Lesley Draper, one of the firm's partners, is responsible for supervising John Beck's advisory activities. She can be reached at 973-425-8420 (ext. 212).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. His telephone number is (305) 781-3040. Larry Nakamura reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth, LLC's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

J. Brent Beene

December 5, 2022

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Additional information about J. Brent Beene is available on the SEC's website at www.adviserinfo.sec.gov.

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ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

J. BRENT BEENE (BORN: 1976)

Educational Background:

- Certified Financial Planner Board of Standards, CFP®, June 2004
- Texas Tech University, M.S., Personal Financial Planning and Business Administration, 2002
- Texas Tech University, B.B.A., 1999

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner and Wealth Advisor 02/2013 to Present
- RegentAtlantic Capital, LLC, Wealth Manager, 2008 to 01/2013

Professional Designation - CFP:

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 three years or professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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

J. Brent Beene does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

J. Brent Beene is not actively engaged in any investment related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

J. Brent Beene does not receive an economic benefit for providing advisory services from a non-client.

Brent is entitled to compensation equal to a percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue Brent generates.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Matthew Masteron, one of the firm's partners, is responsible for supervising J. Brent Beene's advisory activities. He can be reached at 973-425-8420 (ext. 270).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. His telephone number is (305) 781-3040. Larry Nakamura reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth, LLC's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Barbara C. Bilello

December 5, 2022

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Additional information about Barbara C. Bilello is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road,
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

BARBARA C. BILELLO (BORN: 1972)

Educational Background:

- Providence College, B.A., 1994

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner and Wealth Advisor, 01/2022 – Present
- RegentAtlantic, Wealth Advisor, 05/2017 – 12/2021
- U.S. Trust, Private Client Advisor, 12/2013 – 01/2017
- Goldman, Sachs & Co., Chief of Staff, 06/2011 – 05/2013

ITEM 3 - DISCIPLINARY INFORMATION

Barbara C. Bilello does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Barbara C. Bilello is not actively engaged in any investment-related outside business activities. In addition, she is not actively engaged in any other business or occupation for compensation other than her duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Barbara C. Bilello does not receive an economic benefit for providing advisory services from a non-client.

Barbara is entitled to compensation equal to a percentage of the new client revenue she originates for the firm. The percentage is based upon the level of new client revenue Barbara generates.

ITEM 6 – SUPERVISION

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Supervised Person

Jeffrey Boyer

December 5, 2022

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Additional information about Jeffrey Boyer is available on the SEC's website at www.adviserinfo.sec.gov.

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212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

JEFFREY BOYER (BORN: 1978)

Educational Background:

- American College, CFP®, 2009
- Colby College, BA in Political Science, 2000

Business Background

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner and Wealth Advisor, 06/2016 to Present
- RegentAtlantic, Wealth Advisor, 02/2013 to 05/2016
- RegentAtlantic, Wealth Manager, 11/2011 to 01/2013

Professional Designation - CFP:

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- 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 three years of professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; and
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- 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

Jeffrey Boyer does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Jeffrey Boyer is not actively engaged in any investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Jeffrey Boyer does not receive an economic benefit for providing advisory services from a non-client.

Jeffrey is entitled to compensation equal to a percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue Jeffrey generates.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Abby Rosen, one of the firm's partners, is responsible for supervising Jeffrey Boyer's advisory activities. She can be contacted at 973-425-8420 (ext. 226).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

James Ciprich

December 5, 2022

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Additional information about James Ciprich is available on the SEC's website at www.adviserinfo.sec.gov.

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Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

JAMES CIPRICH (BORN: 1973)

Education Background:

- College for Financial Planning, CFP®, 2005
- Rutgers Graduate School of Management, MBA, 1997
- Rutgers University, BA, 1995

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner and Wealth Advisor, 12/2018 to Present
- RegentAtlantic, Wealth Advisor, 02/2013 to 11/2018
- RegentAtlantic, Wealth Manager, 01/2011 to 01/2013

Professional Designation - CFP:

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- Experience: Complete three years of professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; and
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- 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

James Ciprich does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

James Ciprich is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth .

ITEM 5 - ADDITIONAL COMPENSATION

James Ciprich does not receive an economic benefit for providing advisory services from a non-client.

James is entitled to compensation equal to a percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue James generates.

ITEM 6 – SUPERVISION

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All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Christopher J. Cordaro

December 5, 2022

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Additional information about Christopher J. Cordaro is available on the SEC's website at www.adviserinfo.sec.gov.

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973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

CHRISTOPHER J. CORDARO (BORN: 1962)

Educational Background:

- CFA Charterholder, 2001
- Rutgers University, MBA, 2000
- College for Financial Planning, MS, 1992
- College for Financial Planning, CFP®, 1988
- SUNY Maritime College, B.S., 1985

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner and Wealth Advisor, 01/2022 to Present
- RegentAtlantic, Chief Investment Officer and Wealth Advisor: 09/2017 – 12/31/2021
- RegentAtlantic, Chief Executive Officer, Chief Investment Officer, and Wealth Advisor: 03/2017 – 08/2017
- RegentAtlantic, Chief Investment Officer and Wealth Advisor: 06/2013 – 03/2017
- RegentAtlantic, Chief Executive Officer, Chief Investment Officer, and Wealth Advisor: 02/2013 – 05/2013

Professional Designation - CFA

The Chartered Financial Analyst (CFA) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charterholders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

ITEM 3 - DISCIPLINARY INFORMATION

Christopher J. Cordaro does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Christopher J. Cordaro is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Christopher J. Cordaro does not receive an economic benefit for providing advisory services from a non-client.

Christopher is entitled to compensation equal to a percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue Christopher generates.

ITEM 6 – SUPERVISION

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Form ADV Part 2B: Brochure Supplement

Supervised Person

Alex Coriddi

December 5, 2022

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Additional information about Alex Coriddi is available on the SEC's website at www.adviserinfo.sec.gov.

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Morristown, NJ 07960
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ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

ALEX CORIDDI (BORN: 1992)

Educational Background:

- Certified Financial Planner Board of Standards, CFP®, 2016
- St. Joseph's University, B.S., 2014

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- RegentAtlantic, Wealth Advisor, 09/2018 to Present
- RegentAtlantic, Analyst, 06/2014 to 08/2018
- Focus Financial, Intern, 05/2016 to 08/2016

Professional Designation - CFP:

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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 three years of professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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

Alex Coriddi does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Alex Coriddi is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Alex Coriddi does not receive an economic benefit for providing advisory services from a non-client.

Alex is entitled to compensation equal to a percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue Alex generates.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Brian Kazanchy, one of the firm's partners, is responsible for supervising Alex Coriddi's advisory activities. He can be reached at 973-425-8420 (ext. 235).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Lesley Draper

December 5, 2022

This brochure supplement provides information about Lesley Draper that supplements CI RegentAtlantic Private Wealth's brochure. You should have received a copy of that brochure. Please contact Larry Nakamura, Chief Compliance Officer, at (305) 781-3040 or lnakamura@ci.com if you did not receive CI Private Wealth, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Lesley Draper is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

LESLEY DRAPER (BORN: 1971)

Educational Background:

- Certified Financial Planner Board of Standards, CFP®, 2011
- American Bankers Association®, Certified Trust and Financial Advisor, 2006
- Purdue University, B.S. 1994

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner and Wealth Advisor, 05/2019 – Present
- RegentAtlantic, Wealth Advisor, 02/2013 – 04/2019
- RegentAtlantic, Wealth Manager, 12/2012 – 01/2013

Professional Designation - CFP®:

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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 three years or professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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.

Professional Designation – CTFA

The American Bankers Association requirements for the Certified Trust and Financial Advisor (CTFA) are:

- 10 Years' Experience in Wealth Management or
- 5 Years' Experience in Wealth Management and a bachelor's degree or
- 3 Years' Experience in Wealth Management and a completion of all three ABA trust certificates – Foundational, Intermediate, and Advanced

In order to maintain the CTFA, a minimum of 45 continuing education credits must be completed every three years, an annual renewal fee must be paid, and continued adherence to the Code of Ethics.

ITEM 3 - DISCIPLINARY INFORMATION

Lesley Draper does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Lesley Draper is not actively engaged in any Investment-related outside business activities. In addition, she is not actively engaged in any other business or occupation for compensation other than her duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Lesley Draper does not receive an economic benefit for providing advisory services from a non-client.

Lesley is entitled to compensation equal to a percentage of the new client revenue she originates for the firm. The percentage is based upon the level of new client revenue Lesley generates.

ITEM 6 – SUPERVISION

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All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Ian Harvey

December 5, 2022

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Additional information about Ian Harvey is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
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Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

IAN HARVEY (BORN: 1990)

Educational Background:

- Certified Financial Planner Board of Standards, CFP®, 2014
- Virginia Polytechnic Institute and State University, BS, 2012

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 – Present
- RegentAtlantic, Wealth Advisor, 05/2022 – Present
- Bridgewater Advisors, Senior Advisor, 10/2019 to 05/2022
- Financial Asset Management Corp., Financial Planner, 06/2018 to 10/2019
- Sontag Advisory, Associate and Lead Advisor, 04/2015 to 06/2018
- Rockwood Wealth Management, Associate, 05/2012 to 04/2015

Professional Designation - CFP®:

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- Experience: Complete three years of professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; and
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- 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

Ian Harvey does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Ian Harvey is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Ian Harvey does not receive an economic benefit for providing advisory services from a non-client.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Brent Beene, one of the firm's partners, is responsible for supervising Ian Harvey's advisory activities. He can be reached at 973-425-8420 (ext. 230).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Matthew Holden

December 5, 2022

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Additional information about Matthew Holden is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

MATTHEW HOLDEN (BORN: 1989)

Educational Background:

- CFA Charterholder, 2017
- University of Richmond, B.A., 2012

Business Background:

- CI RegentAtlantic Private Wealth, Associate Director, 12/2022 - Present
- RegentAtlantic, Associate Director of Investments, 12/2021 - Present
- RegentAtlantic, Investment Analyst, 10/2014 - 11/2021
- State Street Boston, Associate, 02/2013 – 09/2014
- The Louis Berger Group, Accounting Intern, Summer 2011, May 2012 – January 2013

Professional Designation - CFA

The Chartered Financial Analyst (CFA) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charterholders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

ITEM 3 - DISCIPLINARY INFORMATION

Matthew Holden does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Matthew Holden is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Matthew Holden does not receive an economic benefit for providing advisory services from a non-client.

Matthew is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

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CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Brendan Hughes

December 5, 2022

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Additional information about Brendan Hughes is available on the SEC's website at www.adviserinfo.sec.gov.

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973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

BRENDAN HUGHES (BORN: 1991)

Educational Background:

- Certified Financial Planner (CFP®), 2019
- Caldwell University, B.S., 2013

Business Background:

- CI RegentAtlantic Private Wealth, Associate Wealth Advisor, 12/2022 to Present
- RegentAtlantic, Associate Wealth Advisor 05/2022 to Present
- Pathstone Federal Street, Senior Advisor, 03/2020 to 5/2022
- Pathstone Federal Street, Manager, 07/2019 to 03/2020
- Pathstone Federal Street, Senior Associate, 07/2018 to 08/2019
- Pathstone Federal Street, Associate, 05/2017 to 07/2018
- Bleakley Financial Group, Registered Investment Associate, 06/2012 to 05/2017

Professional Designation - CFP:

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include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning.

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- 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

Brendan Hughes does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Brendan Hughes is not actively engaged in any investment related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Brendan Hughes does not receive an economic benefit for providing advisory services from a non-client.

Brendan Hughes is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

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CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Andrew Kapyrin

December 5, 2022

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Additional information about Andrew Kapyrin is available on the SEC's website at www.adviserinfo.sec.gov.

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Building A, Suite 300
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973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

ANDREW KAPYRIN (BORN: 1983)

Educational Background:

- CFA Charterholder, 2011
- Drew University, B.A., 2006

Business Background:

- CI RegentAtlantic Private Wealth, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner and Co Chief Investment Officer – 12/2021 - Present
- RegentAtlantic, Director of Research and Co-Chair of the Investment Committee, 01/2011 - Present

Professional Designation - CFA

The Chartered Financial Analyst (CFA) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charterholders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

ITEM 3 - DISCIPLINARY INFORMATION

Andrew Kapyrin does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Andrew Kapyrin is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Andrew Kapyrin does not receive an economic benefit for providing advisory services from a non-client.

Andrew is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

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All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Brian Kazanchy

December 5, 2022

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ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

BRIAN KAZANCHY (BORN: 1978)

Educational Background:

- Certified Financial Planner (CFP®), 2006
- CFA Charterholder, 2003
- Fairleigh Dickinson University, MBA, 2003
- University of Richmond, B.S., 2000

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner, and Wealth Advisor 01/2019 to Present
- RegentAtlantic, Partner, Wealth Advisor and Co-Chair of the Investment Committee, 02/2013 to 12/2018
- RegentAtlantic, Wealth Manager and Chair of the Investment Committee, 2008 to 01/2013

Professional Designation - CFP:

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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 three years of professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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.

Professional Designation - CFA:

The Chartered Financial Analyst (CFA) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charterholders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

ITEM 3 - DISCIPLINARY INFORMATION

Brian Kazanchy does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Brian Kazanchy is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Brian Kazanchy does not receive an economic benefit for providing advisory services from a non-client.

Brian is entitled to compensation equal to a percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue Brian generates.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Matthew Masterson, one of the firm's partners, is responsible for supervising Brian Kazanchy's advisory activities. He can be reached at 973-425-8420 (ext. 270).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Michael J. Klinger

December 5, 2022

This brochure supplement provides information about Michael J. Klinger that supplements CI RegentAtlantic Private Wealth's brochure. You should have received a copy of that brochure. Please contact Larry Nakamura, Chief Compliance Officer, at (305) 781-3040 or lnakamura@ci.com if you did not receive CI Private Wealth, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Michael J. Klinger is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

MICHAEL J. KLINGER (BORN: 1993)

Educational Background:

- Certified Financial Planner Board of Standards, CFP®, 2020
- Boston University Center for Professional Education, Certificate in Financial Planning, 2020
- Institute of Technology Carlow, Master's in Business, 2017
- Drew University, BA, 2016

Business Background:

- CI RegentAtlantic, Associate Wealth Advisor, 12/2022 to Present
- RegentAtlantic, Associate Wealth Advisor, 02/2021 to Present
- Morgan Stanley Wealth Management, Financial Advisor ,06/2019 to 02/2021
- Gregory E. Lazicky, CPA, LLC, Staff Accountant, 11/2017 to 06/2019
- National Basketball Association, Senior Staff, NBA Summer League, Summers 2015 to 2018

Professional Designation - CFP®:

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 three years of professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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

Michael J. Klinger does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Michael J. Klinger is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Michael J. Klinger does not receive an economic benefit for providing advisory services from a non-client.

Gerald is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

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All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Dilan A. Kluge

December 5, 2022

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Additional information about Dilan A. Kluge is available on the SEC's website at www.adviserinfo.sec.gov.

100 Park Ave., 28th Floor
New York, NY 10017
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

DILAN A.KLUGE (BORN: 1994)

Educational Background:

- CFA Charterholder, 2021
- University of Delaware, BS, 2016

Business Background:

- CI RegentAtlantic Private Wealth, Associate Director, 12/2022 to Present
- RegentAtlantic, Associate Director of Investments, 12/2021 to Present
- RegentAtlantic, Investment Analyst, 09/2019 to 11/2021
- Hillview Capital Advisors, Investment Analyst, 01/2018 to 08/2019
- Valley Forge Investment Consultants, 06/2016 to 12/2017
- No prior business background in the past five years other than what is listed above

Professional Designation - CFA:

The Chartered Financial Analyst (CFA) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charterholders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct

ITEM 3 - DISCIPLINARY INFORMATION

Dilan Kluge does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Dilan Kluge is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Dilan Kluge does not receive an economic benefit for providing advisory services from a non-client.

Dilan is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

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CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Gerald M. Korey

December 5, 2022

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Additional information about Gerald M. Korey is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
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Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

GERALD M. KOREY (BORN: 1988)

Educational Background:

- Certified Financial Planner Board of Standards, CFP®, 2014
- Alfred State College, BBA, 2010

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- RegentAtlantic, Wealth Advisor, 08/2019 to Present
- RegentAtlantic, Analyst, 07/2014 to 07/2019
- Ameriprise Financial Services, Paraplanner, 05/2011 to 06/2014

Professional Designation - CFP®:

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- 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

Gerald M. Korey does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Gerald M. Korey is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Gerald M. Korey does not receive an economic benefit for providing advisory services from a non-client.

Gerald is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. J. Brent Beene, one of the firm's partners, is responsible for supervising Gerald M. Korey's advisory activities. He can be reached by telephone at 973-425-8420 (ext. 230).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Kyle Kratochvil

December 5, 2022

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Additional information about Kyle Kratochvil is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

KYLE KRATOCHVIL (BORN: 1998)

Educational Background:

- University of Vermont, BS, 2020

Business Background:

- CI RegentAtlantic Private Wealth, Associate Wealth Advisor, 12/2022 to Present
- RegentAtlantic, Associate Wealth Advisor, 06/2021 to Present
- Equitable Advisors, 06/2020 to 06/2021
- Preferred Pool Management, Manager, 05/2018 to 08/2019
- Colonial Landscaping, Founder and CEO, 04/2013 to 06/2016

ITEM 3 - DISCIPLINARY INFORMATION

Kyle Kratovchil does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Kyle Kratovchil is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Kyle Kratovchil does not receive an economic benefit for providing advisory services from a non-client.

Kyle is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

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and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Brian Kazanchy, one of the firm's partners, is responsible for supervising Kyle Kratovchi's advisory activities. He can be reached by telephone at 973-425-8420.

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Ryan Kung

December 5, 2022

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Additional information about Ryan Kung is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

RYAN KUNG (BORN: 1995)

Educational Background:

- University of Delaware, Lerner College of Business and Economics, BS, 2017

Business Background:

- CI RegentAtlantic Private Wealth, Associate Wealth Advisor, 12/2022 to Present
- RegentAtlantic, Associate Wealth Advisor, 07/2021 to Present
- Peapack Private Family Office Services, 06/2017 to 07/2021
- TD Bank, Private Banking Summer Analyst, 06/2026 to 08/2016
- No prior business background in the past five years other than what is listed above

ITEM 3 - DISCIPLINARY INFORMATION

Ryan Kung does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Ryan Kung is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Ryan Kung does not receive an economic benefit for providing advisory services from a non-client.

Ryan is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

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Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Jim Reilly, one of the firm's partners, is responsible for supervising Ryan Kung's advisory activities. He can be reached by telephone at 973-425-8420 (ext. 224).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

James F. Madden

December 5, 2022

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60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

JAMES F. MADDEN (BORN: 1964)

Educational Background:

- University of Georgia, MBA, 1991
- Wake Forest University, BA, 1986

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- RegentAtlantic, Wealth Advisor, 09/2019 to Present
- Hillview Capital Advisor, Principal, Managing Director, Client Wealth Advisor

ITEM 3 - DISCIPLINARY INFORMATION

James Madden does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

James Madden is not actively engaged in any investment related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

James Madden does not receive an economic benefit for providing advisory services from a non-client.

James is entitled to compensation equal to a percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue James generates.

ITEM 6 – SUPERVISION

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Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. J. Brent Beene, one of the firm's partners, is responsible for supervising James Madden's advisory activities. He can be reached by telephone at 973-425-8420 (ext. 230).

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CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Matthew H. Masterson, Jr.

December 5, 2022

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Additional information about Matthew Masterson is available on the SEC's website at www.adviserinfo.sec.gov.

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973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

MATTHEW H. MASTERSON, JR. (BORN: 1986)

Educational Background:

- Certified Private Wealth Advisor® (CPWA®) Certification, The University of Chicago, 2018
- Certified Financial Planner Board of Standards, CFP®, 2016
- Certificate in Financial Planning, FDU University, 2015
- Anisfield School of Business, Ramapo College, BS, 2009

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner, Wealth Advisor and Chief Planning Officer, 11/2021 to Present
- RegentAtlantic, Partner and Wealth Advisor, 07/2020 to 10/2021
- RegentAtlantic, Wealth Advisor, 08/2015 to 06/2020
- Taylor Financial Group, Associate Wealth Advisor, 05/2008 to 08/2015

Professional Designation - CFP®:

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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.

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- 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.

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- Continuing Education: Complete 30 hours of continuing education units 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.

Professional Designation - CPWA®

The CPWA designation signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for the professional designation, which is centered on private wealth management topics and strategies for high-net-worth clients. Prerequisites for the CPWA designation are: a Bachelor's degree from an accredited college or university or one of the following designations or licenses: CIMA®, CIMC®, CFA®, CFP®, ChFC®, or CPA license; have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements, and five years of experience in financial services or delivering services to high-net-worth clients. CPWA designees have completed a rigorous educational process that

includes executive education requirements and successful completion of a comprehensive examination. CPWA designees are required to adhere to the Investments & Wealth Institute Code of Professional Responsibility and Rules and Guidelines for Use of the Marks. CPWA designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through the Investments & Wealth Institute.

ITEM 3 - DISCIPLINARY INFORMATION

Matthew Masterson does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Matthew Masterson is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Matthew Masterson does not receive an economic benefit for providing advisory services from a non-client.

Matt is entitled to compensation equal to a percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue Matt generates.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Abby Rosen, one of the firm's partners, is responsible for supervising Matthew Masterson's advisory activities. She can be reached by telephone at 973-425-8420 (ext. 226).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private

Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Matt Mignon

December 5, 2022

This brochure supplement provides information about Matt Mignon that supplements CI RegentAtlantic Private Wealth's brochure. You should have received a copy of that brochure. Please contact Larry Nakamura, Chief Compliance Officer, at (305) 781-3040 or lnakamura@ci.com if you did not receive CI Private Wealth, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Matt Mignon is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

MATT MIGNON (BORN: 1992)

Educational Background:

- Investments & Wealth Institute, CIMA®, 2018
- Certified Financial Board of Standards, CFP®, 2017
- Northwestern University School of Professional Studies, CFP® Certificate Program, 2015
- Colby College, BA, 2015

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- RegentAtlantic, Wealth Advisor, 01/2021 to Present
- RegentAtlantic, Associate Wealth Advisor, 12/2019 to 12/2020
- RegentAtlantic, Analyst, 06/2015 to 11/2019
- RegentAtlantic, Wealth Management Intern, Summer 2014
- Jamestown Associates, Business & Marketing Intern, Summer 2013

Professional Designation - CFP®

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 three years or professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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.

Professional Designation - CIMA®

The CIMA® certification is granted by the Investment & Wealth Institute. Candidates must submit the certification program application and pass a comprehensive background check. Candidates can then enroll in an education program offered by one of the approved Registered Education Providers once their application is approved. Candidates must then pass the five-hour online Certification Exam. Once the Investments & Wealth Institute receives successful exam results, candidates must complete the final three steps of the process.

- Document a minimum of three years' work experience in financial services and pass a second background check
- Sign an agreement to adhere to the Investments & Wealth Institute's Code of Professional Responsibility and the appropriate use of the certification mark

- Pay an initial certification fee

Certificated professionals must renew their certification every two years. There are three requirements for renewal:

- Complete and report a minimum of 40 hours of continuing education credits, including two ethics hours
- Pay a certification renewal fee
- Complete the compliance requirement – indicating continued adherence to the Institute’s Code of Professional Responsibility, and Rules and Guidelines for Use of the Marks, as well as disclosing any federal/state regulatory actions or complaints.

ITEM 3 - DISCIPLINARY INFORMATION

Matt Mignon does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Matt Mignon is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Matt Mignon does not receive an economic benefit for providing advisory services from a non-client.

Matt is entitled to compensation equal to a percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue Matt generates.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth’s Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm’s investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm’s risk management committee who will take further action, if needed. Jim Reilly, one of the firm’s partners, is responsible for supervising Matt Mignon’s advisory activities. He can be reached at 973-425-8420 (ext. 224).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Zachary Morse

December 5, 2022

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Additional information about Zachary Morse is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
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973-425-8420

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

ZACHARY MORSE (BORN: 1992)

Educational Background:

- The George Washington University, BA, 2015
- University of Haifa, Israel, Honors Program in Peace & Conflict Studies, 2014
- Yonsei University, Seoul, Conflict Resolution, 2013

Business Background:

- CI RegentAtlantic Private Wealth, Associate Wealth Advisor, 12/2022 to Present
- RegentAtlantic, Associate Wealth Advisor, 01/2022 to Present
- Lenox Advisors, Client Service Associate, 01/2020 to 12/2021
- The Associate of National Advertisers, 04/2018 to 01/2020
- The American Israel Public Affairs Committee, 06/2015 to 03/2018

ITEM 3 - DISCIPLINARY INFORMATION

Zachary Morse does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Zachary Morse is not actively engaged in any investment-related outside business activities. He currently has an outside business activity involving buying and selling medical supplies on Amazon.

ITEM 5 - ADDITIONAL COMPENSATION

Zachary Morse does not receive an economic benefit for providing advisory services from a non-client.

Zachary Morse is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

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CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Lisa Neira

December 5, 2022

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Additional information about Lisa Neira is available on the SEC's website at www.adviserinfo.sec.gov.

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212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

LISA NEIRA (BORN: 1986)

Educational Background:

- Certified Financial Board of Standards, CFP®, 2017
- Richard Stockton College of New Jersey BS, 2008

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- RegentAtlantic, Wealth Advisor, 08/2021 to Present
- Fidelity Investments, Vice President, Wealth Planner, 05/2018 to 08/2021
- Fidelity Investments, Financial Consultant, 05/2015 to 05/2018
- Fidelity Investments, Investments Representative, 09/2013 to 05/2015
- Fidelity Investments, Private Client Specialist, 10/2012 to 09/2013
- Fidelity Investments, Financial Representative, 05/2011 to 10/2012
- AXA Advisors, Investment Advisor, 01/2009 to 02/2011

Professional Designation - CFP®

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- 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 three years of professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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

Lisa Neira does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Lisa Neira is not actively engaged in any Investment-related outside business activities. In addition, she is not actively engaged in any other business or occupation for compensation other than her duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Lisa Neira does not receive an economic benefit for providing advisory services from a non-client.

Lisa is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients she originates for the firm.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Abby Rosen, one of the firm's partners, is responsible for supervising Lisa Neira's advisory activities. She can be reached at 973-425-8420 (ext. 226).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Jane P. Newton

December 5, 2022

This brochure supplement provides information about Jane P. Newton that supplements CI RegentAtlantic Private Wealth's brochure. You should have received a copy of that brochure. Please contact Larry Nakamura, Chief Compliance Officer, at (305) 781-3040 or lnakamura@ci.com if you did not receive CI Private Wealth, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Jane P. Newton is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

JANE P. NEWTON (BORN: 1959)

Educational Background:

- Certified Financial Planner Board of Standards, CFP®, 2006
- New York University Graduate School of Business, MBA, Finance, 1987
- Tufts University, B.A., 1981

Business Background:

- CI RegentAtlantic Private Wealth, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner and Wealth Advisor, 01/2013 - Present
- RegentAtlantic, Partner and Wealth Manager, 05/2009 – 01/2013
- RegentAtlantic, Wealth Manager, 2005 – 05/2009

Professional Designation - CFP:

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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 three years of professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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

Jane P. Newton does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Jane P. Newton is not actively engaged in any Investment-related outside business activities. In addition, she is not actively engaged in any other business or occupation for compensation other than her duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Jane P. Newton does not receive an economic benefit for providing advisory services from a non-client.

Jane is entitled to compensation equal to a percentage of the new client revenue she originates for the firm. The percentage is based upon the level of new client revenue Jane generates.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Brian Kazanchy, one of the firm's partners, is responsible for supervising Jane Newton's advisory activities. Brian can be reached at 973-425-8420 (ext. 235).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Matthew Ogus

December 5, 2022

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Additional information about Matthew Ogus is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

MATTHEW OGUS (BORN: 1996)

Educational Background:

- University of Delaware, BS., 2019

Business Background:

- CI RegentAtlantic Private Wealth, Investment Analyst, 12/2022 – Present
- RegentAtlantic, Portfolio Implementation Analyst, 01/2022 – Present
- UBS, Client Service Associate, 01/2020 – 01/2022
- Lamoral LLC, Derivative Investing Intern, 06/2018 – 12/2019
- Hackensack Golf Club, Assistant Starter/Event Coordinator/Caddie, 06/2013 – 11/2019

ITEM 3 - DISCIPLINARY INFORMATION

Matthew Ogus does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Matthew Ogus is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Matthew Ogus does not receive an economic benefit for providing advisory services from a non-client.

Matthew is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Andrew Kapyrin, one of the firm's partners, is responsible for supervising Matthew Ogus's advisory activities. Andrew can be reached by telephone at 973-425-8420 (ext. 251).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Chadderdon W. O'Brien

December 5, 2022

This brochure supplement provides information about Chadderdon O'Brien that supplements CI RegentAtlantic Private Wealth's brochure. You should have received a copy of that brochure. Please contact Larry Nakamura, Chief Compliance Officer, at (305) 781-3040 or lnakamura@ci.com if you did not receive CI Private Wealth, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Chadderdon O'Brien is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
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973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

CHADDERDON W. O'BRIEN (BORN: 1984)

Educational Background:

- Global Association of Risk Professionals, Financial Risk Manager®, 2012
- Fairleigh Dickinson University, Financial Planning Certificate Program, 2009
- Northeastern University, B.S., 2007

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner and Wealth Advisor, 07/2021 to Present
- RegentAtlantic, Wealth Advisor, 10/2015 to 06/2021
- Lassus Wherley & Associates, Financial Planner, 02/2012 to 10/2015

Professional Designation - CFP:

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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.

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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 three years or professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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.

Professional Designation – Financial Risk Manager:

The FRM® certification is granted by the Global Association of Risk Professionals. It is granted after a candidate of two multiple choice exams (FRM Exam Part I and Part II) and demonstrated two years of relevant work experience. Candidates must take the FRM Exam Part I before taking Part II. Certified FRMs are strongly encouraged to earn 40 hours of Continuing Professional Development (CPD) every two years to maintain the latest and best practices in risk management.

ITEM 3 - DISCIPLINARY INFORMATION

Chadderdon O'Brien does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Chadderdon O'Brien is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Chadderdon O'Brien does not receive an economic benefit for providing advisory services from a non-client.

Chadderdon is entitled to compensation equal to a percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue Chadderdon generates.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Brent Beene, one of the firm's partners, is responsible for supervising Chadderdon O'Brien's advisory activities. Brent can be reached by telephone at 973-425-8420 (ext. 230).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Peter J. O'Neill

December 5, 2022

This brochure supplement provides information about Peter O'Neill that supplements CI RegentAtlantic Private Wealth's brochure. You should have received a copy of that brochure. Please contact Larry Nakamura, Chief Compliance Officer, at (305) 781-3040 or lnakamura@ci.com if you did not receive CI Private Wealth, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Peter O'Neill is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937
www.regentatlantic.com

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

PETER J. O'NEILL (BORN: 1987)

Educational Background:

- Fairleigh Dickinson University, Financial Planning Certificate Program, 2016
- Saint Joseph's University Haub School of Business, BS 2012

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- RegentAtlantic, Wealth Advisor, 04/2019 to Present
- Beacon Trust Company, Vice President, Wealth Strategist, 06/2014 to 04/2019
- AMG National Trust Bank, Wealth Management Financial Analyst II, 05/2012 to 06/2014

Professional Designation - CFP:

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 three years of professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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

Peter O'Neill does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Peter O'Neill is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Peter O'Neill does not receive an economic benefit for providing advisory services from a non-client.

Peter is entitled to compensation equal to a percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue Peter generates.

ITEM 6 – SUPERVISION

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CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

R. David Pettit

December 5, 2022

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Additional information about R. David Pettit is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

R. DAVID PETTIT (BORN: 1988)

Educational Background:

- CFP Board of Standards, CFP®, 2020
- Drexel University, BS, 2011

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- RegentAtlantic, Wealth Advisor, 03/2022 to Present
- RegentAtlantic, Associate Wealth Advisor, 12/2019 to 02/2022
- RegentAtlantic, Analyst, 06/2019 to 11/2019
- Coastal Wealth, A Mass Mutual Firm, Investment Advisor Representative, 04/2018 to 06/2019
- Pettit Audio, Audio Engineer, 06/2011 to 04/2018

Professional Designation - CFP:

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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 three years or professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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

R. David Pettit does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

R. David Pettit is not actively engaged in any Investment-related outside business activities. David is currently a freelance audio engineer.

ITEM 5 - ADDITIONAL COMPENSATION

R. David Pettit does not receive an economic benefit for providing advisory services from a non-client.

David is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Lesley Draper, one of the firm's partners, is responsible for supervising R. David Pettit's advisory activities. She can be reached by telephone at 973-425-8420 (ext. 212).

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CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Christopher Piccoli

December 5, 2022

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Additional information about Christopher Piccoli is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
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Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

CHRISTOPHER PICCOLI (BORN: 1986)

Educational Background:

- Certified Financial Planner Board of Standards, CFP®, 2020
- Investments & Wealth Institute, CIMA®, 2015
- Quinnipiac University, BS, 2008

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- RegentAtlantic, Wealth Advisor, 09/2019 to Present
- JP Morgan Securities, Client Advisor, 03/2018 to 05/2019
- JP Morgan Chase Bank, Client Advisor, 03/2018 to 05/2019
- JP Morgan Institutional Investments, Inc., Registered Representative, 10/2014 to 03/2018
- JP Morgan Investment Management, Associate, 09/2014 to 03/2018
- Fred Alger & Co, Regional Marketing Associate, 06/2011 to 09/2014
- MetLife Securities, Sales, 08/2008 to 05/2011

Professional Designation - CFP:

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

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- 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 three years of professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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.

Professional Designation - CIMA®

The CIMA® certification is granted by the Investment & Wealth Institute. Candidates must submit the certification program application and pass a comprehensive background check. Candidates can then enroll in an education program offered by one of the approved Registered Education Providers once their application is approved. Candidates must then pass the five-hour online Certification Exam. Once the Investments & Wealth Institute receives successful exam results, candidates must complete the final three steps of the process.

- Document a minimum of three years' work experience in financial services and pass a second background check
- Sign an agreement to adhere to the Investments & Wealth Institute's Code of Professional Responsibility and the appropriate use of the certification mark
- Pay an initial certification fee

Certificated professionals must renew their certification every two years. There are three requirements for renewal:

- Complete and report a minimum of 40 hours of continuing education credits, including two ethics hours
- Pay a certification renewal fee

Complete the compliance requirement – indicating continued adherence to the Institute's Code of Professional Responsibility, and Rules and Guidelines for Use of the Marks, as well as disclosing any federal/state regulatory actions or complaints.

ITEM 3 - DISCIPLINARY INFORMATION

Chris Piccoli does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Chris Piccoli is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Chris Piccoli does not receive an economic benefit for providing advisory services from a non-client.

Chris is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy

and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Brent Beene, one of the firm's partners, is responsible for supervising Chris Piccoli advisory activities. He can be reached by telephone at 973-425-8420 (ext. 230).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Niko Piccolo

December 5, 2022

This brochure supplement provides information about Niko Piccolo that supplements CI RegentAtlantic Private Wealth's brochure. You should have received a copy of that brochure. Please contact Larry Nakamura, Chief Compliance Officer, at (305) 781-3040 or lnakamura@ci.com if you did not receive CI Private Wealth, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Niko Piccolo is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

NIKO PICCOLO (BORN: 1999)

Educational Background:

- Seton Hall University, MBA, May 2022
- Seton Hall University, BS, May 2021

Business Background:

- CI RegentAtlantic Private Wealth, Investment Analyst, 12/2022 to Present
- RegentAtlantic, Investment Analyst, 11/2022 to Present
- RBC Wealth Management, Analyst, 02/2022 to 11/2022
- Equitable Advisors, Finance Intern, 05/2021 to 08/2021
- No prior business background in the past five years other than what is listed above

ITEM 3 - DISCIPLINARY INFORMATION

Niko Piccolo does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Niko Piccolo is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Niko Piccolo does not receive an economic benefit for providing advisory services from a non-client.

Niko is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth’s Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk

Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Andy Kapyrin, one of the firm's partners, is responsible for supervising Niko Piccolo's advisory activities. He can be reached by telephone at 973-425-8420 (ext. 251).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Paul Platkin

December 5, 2022

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Additional information about Paul Platkin is available on the SEC's website at www.adviserinfo.sec.gov.

100 Park Ave., 28th Floor
New York, NY 10017
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

PAUL PLATKIN (BORN: 1966)

Educational Background:

- CFA Charterholder, 1997
- Columbia Business School, MBA, 1992
- Georgetown University, BSBA 1988

Business Background:

- CI RegentAtlantic Private Wealth, Chief Investment Officer, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner and Co-Chief Investment Officer, 01/2022 to Present
- RegentAtlantic, Partner, Co-Head of Investments, 09/2019 to 12/2021
- Hillview Capital Advisors, Chief Investment Officer, 04/2016 to 08/2019
- Gruss & Co., Chief Investment Officer, 05/2013 to 12/2015

Professional Designation - CFA:

The Chartered Financial Analyst (CFA) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charterholders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

ITEM 3 - DISCIPLINARY INFORMATION

Paul Platkin does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Paul is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Paul does not receive an economic benefit for providing advisory services from a non-client.

Paul is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

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CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

James W. Reilly

December 5, 2022

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Additional information about James W. Reilly is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
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Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

JAMES W. REILLY (BORN: 1966)

Educational Background:

- Fairleigh Dickinson University, CFP®, 2000
- CUNY – Baruch College, MBA, 1996
- University of Notre Dame, B.B.A., 1988

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner and Wealth Advisor: 02/2013 – Present
- RegentAtlantic, Partner and Wealth Manager: 06/2001 – 05/2010
- RegentAtlantic, Wealth Manager: 06/2001 – 01/2013

Professional Designation - CFP:

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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 three years of professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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.

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- Continuing Education: Complete 30 hours of continuing education units 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

James W. Reilly does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

James W. Reilly is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

James W. Reilly does not receive an economic benefit for providing advisory services from a non-client.

James is entitled to compensation equal to a percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue James generates.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Matthew Masterson, one of the firm's partners, is responsible for supervising James Reilly's advisory activities. He can be contacted at 973-425-8240 (ext. 270).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Abigail Rosen

December 5, 2022

This brochure supplement provides information about Abigail Rosen that supplements CI RegentAtlantic Private Wealth's brochure. You should have received a copy of that brochure. Please contact Larry Nakamura, Chief Compliance Officer, at (305) 781-3040 or lnakamura@ci.com if you did not receive CI Private Wealth, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Abigail Rosen is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

ABIGAIL ROSEN (BORN: 1977)

Educational Background:

- Bentley University, MS, 2011
- Fairleigh Dickinson University, Financial Planning Certificate Program, 2008
- Surface Warfare Officer's School, 2000
- College of the Holy Cross, BA, 1999

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner and Wealth Advisor: 05/2019 – Present
- RegentAtlantic, Wealth Advisor: 05/2016 – 04/2019
- Mariner Wealth Advisors, 12/2012 – 05/2016
- Brinton Eaton Wealth Advisors, 07/2007 – 12/2012

Professional Designation - CFP:

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 three years of professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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

Abigail Rosen does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Abigail Rosen is currently the treasurer of the NJ Psychological Foundation, a non-profit board for which she handles the investments. She is also the treasurer of the HTEF (Harding Township Education Foundation).

ITEM 5 - ADDITIONAL COMPENSATION

Abigail Rosen does not receive an economic benefit for providing advisory services from a non-client.

Abby is entitled to compensation equal to a percentage of the new client revenue she originates for the firm. The percentage is based upon the level of new client revenue Abby generates.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Matthew Masterson, one of the firm's partners, is responsible for supervising Abigail Rosen's advisory activities. He can be contacted at 973-425-8240 (ext. 270).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Sagar Shah

December 5, 2022

This brochure supplement provides information about Sagar Shah that supplements CI RegentAtlantic Private Wealth's brochure. You should have received a copy of that brochure. Please contact Larry Nakamura, Chief Compliance Officer, at (305) 781-3040 or lnakamura@ci.com if you did not receive CI Private Wealth, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Sagar Shah is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
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973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

SAGAR SHAH (BORN: 1987)

Educational Background:

- CFA Charterholder, 2017
- Rutgers, The State University of New Jersey, MBA, 2012
- The College of New Jersey, BS, 2009

Business Background:

- CI RegentAtlantic Private Wealth, Client Portfolio Manager, 12/2022 - Present
- RegentAtlantic, Client Portfolio Manager, 09/2021 - Present
- Livian & Co., Managing Director, Equity Portfolio Manager, 09/2017 – 09/2021
- Express Scripts, Senior Financial Analyst, 09/2014 - 05/2017

ITEM 3 - DISCIPLINARY INFORMATION

Sagar Shah does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Sagar Shah is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Sagar Shah does not receive an economic benefit for providing advisory services from a non-client.

Sagar is entitled to compensation equal to 25% of the advisory fee charged by CI RegentAtlantic Private Wealth on the initial four invoices for any clients he originates for the firm.

ITEM 6 – SUPERVISION

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Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Andrew Kapyrin, one of the firm's partners, is responsible for supervising Sagar Shah's advisory activities. Andrew can be reached by telephone at 973-425-8420 (ext. 251).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Bryan D. Smalley

December 5, 2022

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Additional information about Bryan D. Smalley is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
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973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

BRYAN D. SMALLEY (BORN: 1983)

Educational Background:

- Certified Financial Planner Board of Standards, CFP®, 2012
- Boston Institute of Finance, Certificate in Financial Planning, 2011
- Bowling Green State University, M.A., 2007
- University of Toledo, B.A., 2005

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 – Present
- RegentAtlantic, Wealth Advisor, 10/2013 – Present
- RegentAtlantic, Analyst, 05/2011 – 09/2013

Professional Designation - CFP:

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- 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 three years of professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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

Bryan Smalley does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Bryan Smalley is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Bryan Smalley does not receive an economic benefit for providing advisory services from a non-client.

Bryan is entitled to compensation equal to percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue Bryan generates.

ITEM 6 – SUPERVISION

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All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

James R. Sonneborn

December 5, 2022

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Additional information about James R. Sonneborn is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

JAMES R. SONNEBORN (BORN: 1959)

Educational Background:

- Certified Financial Planner Board of Standards, CFP®, 2004
- CFA Charterholder, 1989
- Drexel University, MBA, 1985
- Western State College of Colorado, B.A., 1983

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- CIPW Service Company, LLC, Partner, 01/2022 to Present
- RegentAtlantic, Partner and Wealth Advisor, 05/2017 – Present
- RegentAtlantic, Wealth Advisor, 02/2013 – 04/2017
- RegentAtlantic Capital, LLC, Wealth Manager, 2006 – 01/2013

Professional Designation - CFP:

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”).

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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 three years or professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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 units 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.

Professional Designation – CFA:

The Chartered Financial Analyst (CFA) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charterholders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

ITEM 3 - DISCIPLINARY INFORMATION

James R. Sonneborn does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

James R. Sonneborn is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

James R. Sonneborn does not receive an economic benefit for providing advisory services from a non-client.

James is entitled to compensation equal to percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue James generates.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. J. Brent Beene, one of the firm's partners, is responsible for supervising James Sonneborn's advisor activities. He can be reached by telephone at 973-425-8420 (ext. 230).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

William C. Vaughan

December 5, 2022

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Additional information about William C. Vaughan is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
Building A, Suite 300
Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

WILLIAM C. VAUGHAN (BORN: 1993)

Educational Background:

- CFP Board of Standards, 2019
- Yale University, B.S., 2015

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 to Present
- Wealth Advisor and Co-Chair of the Financial Planning Committee, 11/2021 to Present
- RegentAtlantic, Wealth Advisor, 10/2020 to 10/2021
- RegentAtlantic, Associate Wealth Advisor, 12/2019 to 09/2020
- RegentAtlantic, Analyst, 05/2017 – 11/2019
- NFL Films, Production Assistant, 07/2016 - 02/2017
- Flash de la Courneuve, Professional Football Player, 01/2016 - 07/2016
- NFL Films, Production Assistant, 07/2015 - 12/2015
- Yale School of Medicine, Genetic Researcher, 05/2014 – 08/2014

Professional Designation - CFP:

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- 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 three years of professional experience in the financial planning process, or two years of apprenticeship experience that meets additional requirements. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery supervision, direct support or teaching; 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.

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- 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

William C. Vaughan does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

William C. Vaughan is not actively engaged in any Investment-related outside business activities. In addition, he is not actively engaged in any other business or occupation for compensation other than his duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

William C. Vaughan does not receive an economic benefit for providing advisory services from a non-client.

Will is entitled to compensation equal to a percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue Will generates.

ITEM 6 – SUPERVISION

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All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.

CI RegentAtlantic Private Wealth

Form ADV Part 2B: Brochure Supplement

Supervised Person

Melissa Weisz

December 5, 2022

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Additional information about Melissa Weisz is available on the SEC's website at www.adviserinfo.sec.gov.

60 Columbia Road
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Morristown, NJ 07960
973-425-8420
212-202-2937

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

MELISSA WEISZ (BORN: 1983)

Educational Background:

- CFA Charterholder, 2015
- Certified Financial Planner Board of Standards, CFP®, 2012
- Rutgers, the State University of New Jersey, B.S., 2005

Business Background:

- CI RegentAtlantic Private Wealth, Wealth Advisor, 12/2022 – Present
- RegentAtlantic, Wealth Advisor, February 2017 – Present
- Wechter Feldman Wealth Management, Inc, Vice President and Advisory Services Analyst, February 2012 – February 2017

Professional Designation - CFP:

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- Continuing Education: Complete 30 hours of continuing education units 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.

Professional Designation - CFA:

The Chartered Financial Analyst (CFA) charter is a professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charterholders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

ITEM 3 - DISCIPLINARY INFORMATION

Melissa Weisz does not have legal or disciplinary events to report.

ITEM 4 - OTHER BUSINESS ACTIVITIES

Melissa Weisz is not actively engaged in any Investment-related outside business activities. In addition, she is not actively engaged in any other business or occupation for compensation other than her duties with CI RegentAtlantic Private Wealth.

ITEM 5 - ADDITIONAL COMPENSATION

Melissa Weisz does not receive an economic benefit for providing advisory services from a non-client.

Melissa is entitled to compensation equal to percentage of the new client revenue he originates for the firm. The percentage is based upon the level of new client revenue she generates.

ITEM 6 – SUPERVISION

CI RegentAtlantic Private Wealth's Investment Committee is responsible for executing the investment policy as mandated by the Board of Managers and work in conjunction with the Risk Committee and Management Team. The firm's investment team then implements this policy and monitors the client portfolios. Reports to ensure that portfolios are in compliance with the investment policy are reviewed by the firm's risk management committee who will take further action, if needed. Lesley Draper, one of the firm's partners, is responsible for supervising Melissa Weisz's advisory activities. She can be contacted at 973-425-8420 (ext. 212).

All supervised persons must comply with CI Private Wealth, LLC's compliance policies and procedures, which are designed to provide guidance with respect to both upholding CI Private Wealth's fiduciary responsibility to act in the best interest of clients as well as complying with regulations and best practices. Larry Nakamura is the Chief Compliance Officer and is responsible for the overall monitoring of these compliance policies and procedures. Larry's telephone number is (305) 781-3040. He reviews various compliance areas on an ongoing basis to ensure that the compliance policies and procedures remain current, meet regulatory requirements, and are consistent with CI Private Wealth's business.