

**Bryan Cooney**  
(hereinafter “Supervised Person”)

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[www.McAdamFA.com](http://www.McAdamFA.com)

This Brochure Supplement provides information about Supervised Person that supplements the Disclosure Brochure of McAdam LLC (hereinafter “McAdam”), a copy of which you should have received. Please contact McAdam’s Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Supervised Person is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).



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## Item 2. Educational Background and Business Experience

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Born 1992

### Post Secondary Education

Lebanon Valley College | B.S. Business Administration & Economics | 2019

### Recent Business Background

McAdam LLC | Investment Adviser Representative | October 2014 - Present

Purshe Kaplan Sterling Investments, Inc | Registered Representative | October 2014 - Present

Cooney Wealth Management, LLC | Wealth Management | December 2017 - Present

JA Bentley & Co. | Independent Insurance Agent | July 2014 - October 2014

McAdam Financial Group, LLC | Investment Advisor Representative | July 2014 - October 2014

ING Financial Partners Inc / Voya Financial Advisors Inc | Investment Advisor Representative | June 2014 - October 2014

Northwestern Mutual | Financial Representative Intern | August 2013 - April 2014

### Professional Designations

Supervised Person holds the professional designation of Chartered Retirement Planning CounselorSM (“CRPC®”).

The CRPC® designation is a retirement planning credential awarded by the College for Financial Planning® to individuals who meet its educational, examination and ethical requirements. Certificants are required to have completed the CRPC® Designation Program, a self-taught educational program focused on various pre- and post-retirement needs of individuals. Recipients are further required to have successfully passed a multiple-choice examination addressing a range retirement related matters, such as estate planning and asset management. On an ongoing basis, CRPC® designees are also required to affirm their adherence to the applicable Code of Ethics and complete at least 16 hours of continuing education every two years.

For additional information about this credential, please refer directly to the website of the issuing organization.

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## Item 3. Disciplinary Information

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McAdam is required to disclose information regarding any legal or disciplinary events material to a client’s evaluation of Supervised Person. McAdam has no information to disclose in relation to this Item.

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## Item 4. Other Business Activities

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### Registered Representative of a Broker-Dealer

Supervised Person is a registered representative of Purshe Kaplan Sterling Investments, Inc. (“PKS”), an SEC registered broker-dealer and member of FINRA. In this capacity, Supervised Person may provide securities brokerage services and implement securities transactions under a commission based arrangement. Supervised Person may be entitled to a portion of the brokerage commissions paid to PKS, as well as a share of any ongoing distribution or service (“trail”) fees from the sale of mutual funds.



A conflict of interest exists to the extent that Supervised Person recommends the purchase of securities where Supervised Person receives commissions or other additional compensation as a result. This practice may give Supervised Person an incentive to recommend investment products based on compensation received rather than on the client's needs. McAdam has procedures in place to ensure that all recommendations are made in the best interests of clients regardless of any additional compensation earned. For accounts covered by ERISA (and such others that McAdam deems appropriate), McAdam provides investment advisory services on a fee offset basis, whereby McAdam reduces its fees by an amount equal to the aggregate commissions and 12b-1 fees earned by Supervised Person as a registered representative of PKS.

### **Licensed Insurance Agent**

Supervised Person is a licensed insurance agent and in such capacity may recommend, on a fully-disclosed commission basis, the purchase of certain insurance products. A conflict of interest exists to the extent that McAdam recommends the purchase of insurance products where Supervised Person receives insurance commissions or other additional compensation. McAdam seeks to ensure that all recommendations are made in the best interests of clients regardless of any additional compensation earned.

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## **Item 5. Additional Compensation**

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McAdam is required to disclose information regarding any arrangement under which Supervised Person receives an economic benefit from someone other than a client for providing investment advisory services. McAdam has no information to disclose in relation to this Item.

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## **Item 6. Supervision**

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Robert Carroll, Supervisor, is generally responsible for supervising Supervised Person's advisory activities on behalf of McAdam. Robert Carroll can be reached at McAdam's main telephone number listed on the cover page of this Brochure Supplement.

McAdam supervises its personnel and the investments made in client accounts. McAdam monitors the investments recommended by Supervised Person to ensure they are suitable for the particular client and consistent with the client's investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. McAdam periodically reviews the advisory activities of Supervised Person, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Supervised Person.