

This brochure supplement provides information about Paul C Impellizeri that supplements the Cascio Wealth Management brochure. You should have received a copy of that brochure. Please contact Paul C Impellizeri if you did not receive Cascio Wealth Management's brochure or if you have any questions about the contents of this supplement.

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

**Paul C Impellizeri DBA Cascio Wealth
Management**
Form ADV Part 2B – Individual Disclosure Brochure

for

Paul C Impellizeri
Personal CRD Number: 2254850
Investment Adviser Representative

Paul C Impellizeri DBA Cascio Wealth Management
116 The Terrace
Sea Girt, NJ 08750
(732) 921-6206
paul@casciowealth.com

UPDATED: 01/27/2023

Item 2: Educational Background and Business Experience

Name: Paul C Impellizeri **Born:** 1956

Educational Background and Professional Designations:

Education:

Bachelor of Science Management, Stockton University - 1979

Business Background:

10/2021 - Present	Chief Compliance Officer Cascio Wealth Management
09/2012 - 09/2021	Financial Advisor Private Advisor Group, LLC
09/2012 - 09/2021	Financial Advisor LPL
04/2008 - 08/2012	Financial Advisor Capital One

Item 3: Disciplinary Information

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

Item 4: Other Business Activities

Paul C Impellizeri is a licensed insurance agent with SFG Annuity Advisors, and from time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Cascio Wealth Management always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to implement the

plan through any representative of Cascio Wealth Management in their capacity as a licensed insurance agent.

Item 5: Additional Compensation

Paul C Impellizeri does not receive any economic benefit from any person, company, or organization, other than Cascio Wealth Management in exchange for providing clients advisory services through Cascio Wealth Management.

Item 6: Supervision

As the Chief Compliance Officer of Cascio Wealth Management, Paul C Impellizeri supervises all activities of the firm. Paul C Impellizeri's contact information is on the cover page of this disclosure document. Paul C Impellizeri adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

Item 7: Requirements For State Registered Advisers

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

- A. Paul C Impellizeri has not been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
 2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
- B. Paul C Impellizeri has NOT been the subject of a bankruptcy.