



**Part 2B of Form ADV: Brochure Supplement**

March 7, 2024

**CenterPoint Wealth Management, LLC**

SEC File No. 801-61048

**Patrick J. Hoehne**

**Portfolio Manager**

CRD No. 6080106

56 N. Main Street  
Zionsville, IN 46077

Telephone: (317) 973-7700  
Email: [info@centerpointwm.com](mailto:info@centerpointwm.com)

This brochure supplement provides information about Patrick J. Hoehne that supplements the CenterPoint Wealth Management, LLC, brochure. You should have received a copy of that brochure. If you did not receive a brochure or if you have any questions about the contents of this supplement, please contact us at [info@centerpointwm.com](mailto:info@centerpointwm.com).

Additional information about Patrick J. Hoehne is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2: Educational Background and Business Experience

Patrick J. Hoehne (b. 1975) is a Portfolio Manager for CenterPoint Wealth Management, LLC.

### A. Educational Background

BS, Business-Finance, Indiana University 1997

### B. Business Background

Portfolio Manager, CenterPoint Wealth Management, LLC 06/2012–Present

Securities Analyst, 40/86 Advisors 10/2000–05/2012

Corporate Banking Relationship Officer, KeyCorp 06/1997–09/2000

### C. Professional Designations - Qualifications and Related Criteria

#### Chartered Financial Analyst® (CFA®)

The CFA® designation is an international professional certificate that is offered by the CFA Institute. Candidates that pursue the certification have in-depth knowledge of securities types and investment vehicles. In order to qualify for a CFA®, candidates must meet standards for examination, education, experience, and ethics. First, candidates must possess a bachelor's degree from an accredited school, or its equivalent. Second, candidates must have completed 48 months of qualified professional work experience, generally related to evaluating or applying financial, economic, and/or statistical data as part of the investment decision-making process involving securities or similar investment. Third, candidates must pass a series of three six-hour exams that covers ethics, quantitative methods, economics, corporate finance, financial reporting and analysis, security analysis, and portfolio management. Finally, candidates must meet and continue to adhere to a strict Code of Ethics and Standards governing their professional conduct, as reviewed by the CFA Institute.

## Item 3: Disciplinary Information

Patrick J. Hoehne has no reportable disciplinary history. Public information concerning Mr Hoehne's registration as an investment advisor representative may be found by accessing the SEC's public disclosure site at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 4: Other Business Activities

- Investment-Related Activities
  - Mr. Hoehne is not engaged in any other investment-related activities.
  - Mr. Hoehne does not receive commissions, bonuses, or other compensation on the sale of securities or other investment products.

- Non-Investment-Related Activities
  - Mr. Hoehne is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

## **Item 5: Additional Compensation**

Mr. Hoehne does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## **Item 6: Supervision**

Every employee has a responsibility for knowing and following the firm's policies and procedures. Every person in a supervisory role is also responsible for those individuals under his/her supervision. Brian J. Brunner, Managing Member, has overall supervisory responsibility for the firm.

Gery Sadzewicz, as the Chief Compliance Officer, has the overall responsibility for administering, monitoring and testing compliance with CenterPoint's policies and procedures. Possible violations of these policies or procedures will be documented and reported to Brian J. Brunner for remedial action. Mr. Brunner can be reached at 317-973-7700.



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**CenterPoint Wealth Management, LLC**

SEC File No. 801-61048

**Eric F. Geary**

**Wealth Management Associate**

CRD No. 6615802

56 N. Main Street  
Zionsville, IN 46077

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Email: [eric@centerpointwm.com](mailto:eric@centerpointwm.com)

This brochure supplement provides information about Eric F. Geary that supplements the CenterPoint Wealth Management, LLC, brochure. You should have received a copy of that brochure. If you did not receive a brochure or if you have any questions about the contents of this supplement, please contact us at [info@centerpointwm.com](mailto:info@centerpointwm.com).

Additional information about Eric F. Geary is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2: Educational Background and Business Experience

Eric F. Geary (b. 1989) is a Wealth Management Associate with CenterPoint Wealth Management, LLC.

### A. Educational Background

B.A., Accounting, Franklin College	2012
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### B. Business Background

Wealth Management Associate CenterPoint Wealth Management, LLC	02/2022–Present
Wealth Advisor, Column Capital Wealth Management	11/2015–02/2022

## Item 3: Disciplinary Information

Eric F. Geary does not have any disciplinary action to report. Public information concerning his registration as an investment advisor representative may be found by accessing the SEC's public disclosure site at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 4: Other Business Activities

There is nothing to report for this item.

## Item 5: Additional Compensation

There is nothing to report for this item.

## Item 6: Supervision

Every employee has a responsibility for knowing and following the firm's policies and procedures. Every person in a supervisory role is also responsible for those individuals under his/her supervision. Brian J. Brunner, Managing Member, has overall supervisory responsibility for the firm.

Gery Sadzewicz, as the Chief Compliance Officer, has the overall responsibility for administering, monitoring and testing compliance with CenterPoint's policies and procedures. Possible violations of these policies or procedures will be documented and reported to Brian J. Brunner for remedial action. Mr. Brunner can be reached at 317-973-7700.



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**CenterPoint Wealth Management, LLC**

SEC File No. 801-61048

**Brian J. Brunner**

**Managing Member**

CRD No. 4519903

56 N. Main Street  
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Telephone: (317) 973-7700  
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This brochure supplement provides information about Brian J. Brunner that supplements the CenterPoint Wealth Management, LLC, brochure. You should have received a copy of that brochure. If you did not receive a brochure or if you have any questions about the contents of this supplement, please contact us at [info@centerpointwm.com](mailto:info@centerpointwm.com).

Additional information about Brian J. Brunner is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2: Educational Background and Business Experience

Brian J. Brunner (b. 1972) is the Managing Member of CenterPoint Wealth Management, LLC.

### A. Educational Background

B.S., Management/Accounting, Purdue University 1994

### B. Business Background

Managing Member, CenterPoint Wealth Management, LLC 09/2001–Present

Senior Manager, Deloitte & Touche, LLP 01/1993–08/2001

### C. Professional Designations - Qualifications and Related Criteria

#### Certified Public Accountant (CPA)

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two-year period or 120 hours over a three-year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct, which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

In addition to the Code of Professional Conduct, AICPA members who provide personal financial planning services are required to follow the Statement on Standards in Personal Financial Planning Services (the "Statement"). Most state boards of accountancy define financial planning as the practice of public accounting and therefore have jurisdiction over CPAs practicing in this discipline; state boards would likely look to the Statement as the authoritative guidance in this practice area regardless of specific or blanket adoption of AICPA standards.

#### CERTIFIED FINANCIAL PLANNER™ (CFP®) Professional

Individuals certified by CFP® Board have taken the step to demonstrate their professionalism by voluntarily submitting to the CFP® certification process that includes thorough education, examination, experience and ethical requirements. The CFP® is issued by the Certified Financial Planner Board of Standards, Inc. Prerequisites require a designee to hold a Bachelor's degree (or higher) from an accredited college or university as well as three years of full-time personal

financial planning experience. The designee is then required to complete a CFP® board registered program, or hold one of the following designations; CPA, ChFC, CLU, CFA, PH.D. in business or economics, Doctor of Business Administration, or Attorney's License. The designee is then required to complete the CFP® certification examination. In addition, the designee is required to complete 30 hours of continuing education every two years.

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

Brian J. Brunner has no reportable disciplinary history. Public information concerning Mr Brunner's registration as an investment advisor representative may be found by accessing the SEC's public disclosure site at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Mr. Brunner is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

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

There is nothing to report for this item.

### **Item 6: Supervision**

Every employee has a responsibility for knowing and following the firm's policies and procedures. Every person in a supervisory role is also responsible for those individuals under his/her supervision. Brian J. Brunner, Managing Member, has overall supervisory responsibility for the firm.

Gery Sadzewicz, as the Chief Compliance Officer, has the overall responsibility for administering, monitoring and testing compliance with CenterPoint's policies and procedures. Possible violations of these policies or procedures will be documented and reported to Brian J. Brunner for remedial action. Mr. Brunner can be reached at 317-973-7700.