

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

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**DBA: Corbett Road Wealth Management**

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This brochure supplement provides information about Christopher Scott Airey, and his team at Corbett Road Wealth Management, that supplements the Spire Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Sue McKeown if you did not receive Spire Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

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

**Item 1**

The Corbett Road Wealth Management ("CRWM") Services for high net worth individuals includes:

- Investment management
- Wealth/Retirement/Estate/Distribution Planning
- Wealth Transfer

CRWM has provided customized Wealth Management solutions to unique clientele nationwide since 2002. We differentiate our company through a unique, proprietary approach to tactical asset management, comprehensive financial planning and a very high level of client service.

CRWM offers three different levels of Planning and Consulting services with regards to Wealth Management, entitled smartlife™ Wealth Services.

1. **smartlife™ Access** is the fundamental level of Wealth Management offered by CRWM. The Access service level is included within the base Investment Management fee a client pays CRWM. Access is defined as periodic and situational client driven advice that is rooted in a client's initial qualitative, quantitative, and behavioral metrics.
2. **smartlife™ Foundational** is an additional optional service that entails a completed financial plan for a client, assessed at an **hourly fee**. That plan is a point-in-time assessment of a client's finances and their desired future. Foundation accounts for a client's behavioral tendencies and habits in addition to the traditional quantitative measurements and projections.
3. **smartlife™ Planning and Consulting** is a **subscription-based consulting service** that includes a financial plan. In addition to the financial plan, CRWM Advisors provide a continuous coordinated effort, through education, goal setting, and coaching to assist clients in achieving their desired goals, both financial and personal

## Fee Schedule

Our annual fees for Investment Advisory Services are charged monthly, in arrears, based on an average daily balance of the Assets Under Management ("AUM") and may be calculated by either:

Tiered Billing: This calculation uses independent levels or "tiers" to calculate a client's fee due. Each Tier, defined by a range of AUM, has its own pricing structure and must be calculated independently of the other tiers. The total fee calculation is the sum of all tiers.

Banded Billing: This calculation uses pricing bands to calculate the client's fee due. Each band, defined by a range of AUM, has its own pricing structure and is applied to the entirety of a client's AUM.

Flat: A flat percentage charged monthly, in arrears, based upon total AUM.

CONFLICT OF INTEREST AND DISCLOSURE. We hereby disclose that:CRWM's affiliate (CRCM) has a direct financial interest in OPPX. There is a conflict between the duties owed by Spire and CRWM to you and the duties owed by CRWM's affiliate (CRCM) to OPPX. By owning OPPX, you could end up paying additional costs as a result of the investment in OPPX versus other holdings that the client may currently or otherwise hold.

In that a client directs Corbett Road to sell all positions and/or remove a strategy from a specific account or accounts and remain in cash, Corbett Road will continue to charge up to a minimum of 45 bps per annum (broken down monthly) on those accounts unless they are removed from Corbett Road's management. Once the account(s) in question are invested back into an approved strategy, Corbett Road will then begin charging the management fee stated in the Investment Management Agreement.

#### **Corbett Road Members:**

##### **C. Scott Airey, CFP®, MBA, AWMA®**

Scott is the founder and President of Corbett Road and is a member of the Corbett Road Investment Committee. Prior to founding Corbett Road, Scott was a Branch Manager at Charles Schwab and began his financial services career at Legg Mason Wood Walker. Scott earned his BS in Consumer Economics from the University of Delaware and MBA from the University of Baltimore. He is a Certified Financial Planner™, Accredited Wealth Management Advisor<sup>SM</sup>, and holds FINRA Series 7, 9, 10, 63, and 65 licenses and Life, Health, and Variable Annuity Insurance licenses.

##### **Jeffrey McCoy, AAMS®, CFF**

Jeff is a Managing Partner at Corbett Road and a member of the Corbett Road Investment Committee. Prior to joining Corbett Road, Jeff spent 17 years as a VP/Branch Manager at Charles Schwab, overseeing several branch locations in Maryland and Virginia. Jeff spent his early years in the industry with T. Rowe Price Associates and Legg Mason Wood Walker. Jeff has a Bachelor of Science in Consumer Economics from the University of Delaware and holds FINRA Series 7,9,10,63, and 65 licenses. He has also earned the Accredited Asset Management Specialist and Certified Financial Fiduciary® designations.

**Matthew Gaffey, CFP®, ChFC®, BFA™, CFF**

Matthew is a Managing Partner at Corbett Road and a member of the Corbett Road Investment Committee. He offers clients years of financial services, retirement planning, and wealth management experience. Prior to joining Corbett Road, Matthew worked for Fidelity Investments and was a President's Circle Award Winner. He has a Bachelor of Science from Virginia Tech and has earned the Certified Financial Planner®, Chartered Financial Consultant®, Behavioral Financial Advisor™, and Certified Financial Fiduciary® designations. He also holds FINRA Series 7 and 66 licenses, as well as Life, Health, and Variable Annuity insurance licenses. Matthew is a member of the Financial Planning Association and Virginia Tech Alumni Association

**Liliana N. Molina, CFP®, MBA, CFF**

Senior Wealth Manager – Private Client Group

Lili provides her clients with the support they need to identify their goals and develop sound plans for their financial future. She believes success should be measured not just by your financial well-being, but by how confident you feel about your future. Her mission is to help clients reach their financial goals through a relationship based on personalized, knowledgeable advice. Lili earned her BA from George Mason University and MBA from George Washington University. She is a Certified Financial Planner™ and Certified Financial Fiduciary®. Lili also holds FINRA Series 6, 7, 63, and 65 licenses and Life, Health, and Variable Annuity Insurance licenses.

**Rush Zarrabian, CFA**

Rush is a Managing Partner of Corbett Road and directs the Investment Management Division. He is a member of the Corbett Road Investment Committee and is the Portfolio Manager for the Opportunity, Dynamic ETF, and Core Demand strategies. Before joining Corbett Road, Rush worked at two of the largest financial institutions in the country in a variety of roles, including management, operations, and lending. Rush has a Bachelor of Science in Finance from Virginia Tech and holds FINRA Series 7 and 66 licenses. He is a CFA Charterholder and a member of the CFA Institute and CFA Society of Washington, D.C.

**Maureen Pitts, AAMS®, CFF**

Maureen is a Managing Partner of Corbett Road and oversees client relations and general administration for the team. Maureen previously worked as an account services supervisor at ADVISORport Inc., a financial services provider. She has years of experience work in the financial services industry providing excellent customer service to large enterprise sponsors, RIAs and money managers. Maureen earned a Bachelor

of Science in Business Administration from Cabrini College and holds FINRA Series 7, as well as Life, Health and Variable Annuity Insurance licenses. She is also an Accredited Asset Management Specialist and Certified Financial Fiduciary®.

**Carmen Dello Iacono, CFA®**

Carmen is a Research Analyst for Corbett Road. He works in Corbett Road's Investment Management Division where he supports all of the firm's investment strategies and is a member of the Corbett Road Investment Committee. Before joining Corbett Road, Carmen worked as an Investment Consultant at a large financial data company. Carmen earned a Bachelor of Science in Physics with a minor in Mathematics at Boston College. Carmen holds Series 7 and 66 licenses is a CFA Charterholder. He is also a member of the CFA Institute, CFA Society of Washington, D.C., and the Boston College Alumni Association.

**Alexi Sacco, CFF**

Alexi is a Senior Regional Wealth Consultant for Corbett Road. He provides clients with a holistic view of their financial picture. By identifying their current financial situation, risk tolerance, and future lifetime goals, Alexi is able to deliver a more comprehensive and individualized client experience. Prior to joining Corbett Road, Alexi worked as a Financial Advisor at Oppenheimer and an Associate at UBS.

He received a Bachelor of Science from American University and is a member of the American University Alumni Association. Alexi is a Certified Financial Fiduciary® and holds FINRA Series 7 and Series 66 licenses, as well as Life, Health, and Variable Annuity insurance licenses.

**Will Cunningham, CFP®, BFF®, CFF**

Will is a Senior Wealth Manager for Corbett Road. He offers clients years of financial services, investment guidance and individualized planning experience. Will uses our Milestone™ planning process to assist clients in achieving their financial goals. Prior to joining Corbett Road, Will worked as a Client Relationship Advisor for a mutual fund company. While there, he provided retirement planning services to their high net asset clients. Will earned a Bachelor of Arts from James Madison University and is a Certified Financial Planner™ and Certified Financial Fiduciary®. He holds FINA Series 7, Series 63, and Series 65 licenses.

**Kit Frederick, CFP®, BFA®, CFF**

Kit is a Sr. Wealth Manager - Private Client Group - for Corbett Road. He believes that

everyone can benefit from the right type of planning. Prior to joining Corbett Road, Kit worked for two financial services firms where he delivered comprehensive planning and services to individuals and families. He received a Bachelor of Science in Finance from Virginia Tech and is a member of the Virginia Tech Alumni Association. Kit is a Certified Financial Planner™, Certified Financial Fiduciary®, and holds FINRA Series 7 and Series 66 licenses, as well as Life, Health, and Variable Annuity insurance licenses.

**Sean Rosencrance, CFP®, BFA®, CFF**

Sean is a Wealth Manager for Corbett Road. He prioritizes focusing on understanding his clients and their personal motivations. He has found he has been able to add the most value to a relationship through active listening and asking the right questions. He earned a Bachelor of Science in Finance with a concentration in Financial Planning at Virginia Tech and is a member of the Virginia Tech Alumni Association. He has also earned the Certified Financial Planner™ and Certified Financial Fiduciary® designations and holds FINRA Series 7 and Series 66 licenses, as well as Life, Health, and Variable Annuity Insurance licenses.

**Marcus Malone, CFP®, CFF**

Marcus is a Wealth Manager for Corbett Road. He offers years of experience in the financial services arena and believes planning is an integral part in helping a client achieve their personal measure of success. Prior to Corbett Road, Marcus worked for Pioneer Investments, providing exceptional customer service to investors across the country. He also spent time with International Fund Services, in which he was responsible for the complete administration of multiple hedge funds and the management of many high-profile relationships. Marcus earned a BS from Virginia Tech and holds FINRA Series 7 and 66 licenses. Marcus is also a Certified Financial Fiduciary® and has Life, Health, and Variable Annuity Insurance licenses.

**Zachary Joiner, CFP®, BFA®, CFF**

Zachary is a Senior Wealth Manager at Corbett Road and has many years of experience in the financial services industry. He prefers to take a comprehensive financial planning approach when working with clients and places an emphasis on examining a client's investments, taxes, risk management, goal setting, and estate planning. Prior to coming to Corbett Road, Zachary was the Director of Financial Planning at a wealth management firm in the St. Louis area and worked with individuals, families, and business owners. He is a Certified Financial Planner™, Behavioral Financial Advisor™, Certified Financial Fiduciary®, and holds a FINRA Series 66 license. Zachary graduated from Southern Illinois University Edwardsville with a Bachelor of Science in Business Administration with an emphasis in Finance. Zach

enjoys donating time to St. Louis Children's Hospital and is a member of their Ambassador Committee.

### **Carolyn Kitzel, CFP®**

Carolyn is a Senior Regional Wealth Consultant at Corbett Road and has been working in the financial industry for several years. Carolyn built her career advising institutional and high net worth clientele and has a wide breadth of knowledge in financial services, retirement planning, and investment management. Prior to joining Corbett Road, she held roles in trust and estate management and has extensive experience in complex planning. This experience has given her deep insight into the industry and has helped shape her philosophy for helping clients. Carolyn earned her Bachelor of Science from Kent State University, is a Certified Financial Planner™ and holds the FINRA Series 66 license.

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

**Full Legal Name:** Christopher Scott Airey      **Born:** 1968

### **Education**

- Univ of Delaware; BS; 1991
- Univ. of Baltimore; MBA; 2002

### **Business Experience**

- Corbett Road President; from 8/28/2003 to present

## **Item 3 Disciplinary Information**

Scott Airey currently has no events to disclosure.

## **Item 4 Other Business Activities**

### **A. Investment-Related Activities**

Christopher Scott Airey, an Investment Advisor Representative of Spire Wealth Management is the owner and President of Corbett Road Investment Management, which provides separate account management services to Advisors and Institutions. Christopher Scott Airey is also the owner of Corbett Road Capital Management, an SEC registered investment advisor.

1. Christopher Scott Airey is also engaged in the following investment-related activities:

### Registered representative of a broker-dealer

Advisor also carries the securities license required by FINRA (Financial Industry Regulatory Authority) in order to offer securities products and execute securities transactions separate from their registration as an Investment Advisor representative providing investment advice. This additional licensing allows our advisors a much more robust suite of products to offer to their clients. Registration, supervision and continuing education are all requirements for maintaining this type of registration.

Conflicts of holding this type of license could be in cross-selling. Selling out of an advisory account and buying in a securities account and thereby generating a commission for the representative. Moving monies from an advisory account into a commission account in order to affect a commissionable trade.

Accounts and trades are reviewed for these types of activities.

The types of commissions that may be earned on these types of accounts/products could be any one of the following:

1. Mutual Fund 12b-1 commissions
2. Mutual Funds Trail Commissions
3. Direct Product Sponsor Commissions

### Insurance company or agency

Licensed as an insurance representative allows the advisor to offer various insurance products such as Variable Annuities, Life Insurance, Long Term Care insurance. Typically these products generate commission payments to the representatives selling the products. The ability to offer these products to clients allows the advisor a much more robust suite of products and thereby providing the client with a much more comprehensive financial plan

2. Christopher Scott Airey receives commissions, bonuses or other compensation on the sale of securities or other investment products.

Holding these additional licenses and allowing the advisor the ability to offer securities products and insurance products in addition to their investment advice, may create a conflict of interest if the advisor is recommending these products in order to generate commissions rather than looking out for the best interests of the client. Each of these purchases is reviewed and approved by a principal of the firm. In addition, many of these products come with additional disclosures so that the client can fully understand the product.



3. Christopher Scott Airey 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**

As the owner of CRCM, Mr. Airey receives sub-advisor compensation for the advisory services provided to the ETF, OPPX.

### **Item 6 Supervision**

**Supervisor:** Sal Malik

**Title:** Director of Supervision

**Phone Number:** 703-657-6075

In addition to an annual in person review of our firms policies and procedures, each advisor is subject to the following ongoing supervision and review:

Daily trade reviews

Monthly review of personal securities accounts

Monthly correspondence reviews - including ongoing capture and review of email

Periodic reviews of client account activity