

**Form ADV Part 2B - Brochure Supplement
Item 1: Cover Page
March 2022**

Kevin A. Kennedy, CPA

CRD# 2891568

**Kennedy Wealth and Tax Management, Inc.
One Pomperaug Office Park, Suite 307
Southbury, CT 06488**

www.kennedywealth.com

This brochure supplement provides information about Kevin A. Kennedy, CPA that supplements our brochure. You should have received a copy of that brochure. Please contact Gregory J. Bungler, Chief Compliance Officer if you did not receive Kennedy Wealth and Tax Management, Inc.'s brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Kennedy is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

Kevin Andrew Kennedy, CPA

Year of Birth: 1969

Educational Background:

- 1991: University of Connecticut; Bachelor of Science in Accounting

Business Background:

- 09/2014 – Present Kennedy Wealth and Tax Management, Inc.;
Managing Member and Investment Adviser Representative
- 09/1995 – Present Kennedy & Company, PC, CPA's; President and Tax Preparer
- 06/2003 – 09/2014 Cambridge Investment Research, Inc.;
Registered Representative
- 06/2003 – 09/2014 Cambridge Investment Research Advisors, Inc.;
Investment Adviser Representative

Exams, Licenses & Other Professional Designations:

- 10/2007 – Series 62
- 01/2006 – Connecticut Life and Health Insurance License
- 01/2003 – Series 65
- 07/1997 – Series 6
- 07/1997 – Series 63
- 02/1995 – Certified Public Accountant

Certified Public Accountant (CPA)

Mr. Kennedy has a professional designation, Certified Public Accountant. CPAs are licensed and regulated by their state boards of accountancy. Experience and testing requirements for licensure as a CPA generally include minimum college education, minimum experience levels, and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of continuing professional education. 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.

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to the evaluation of Mr. Kennedy.

Item 4: Other Business Activities

Mr. Kennedy is also a Certified Public Accountant and offers tax preparation through Kennedy & Company, PC, CPA's. While he assists in tax preparation, he does not have signatory authority over client accounts. He devotes approximately 80 hours per month to this activity. His duties entail

gathering tax related client data, preparing tax returns, and advising on tax planning strategies. Clients are under no obligation to utilize this service.

Item 5: Additional Compensation

Mr. Kennedy does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Gregory J. Bunger, Chief Compliance Officer of Kennedy Wealth and Tax Management, Inc., supervises and monitors Mr. Kennedy's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Bunger if you have any questions about Mr. Kennedy's brochure supplement.