

Supervised Person Brochure

Part 2B of Form ADV

William H. Wilkinson, III



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This brochure supplement provides information about William H. Wilkinson, III that supplements 360 Wealth Management, Inc.'s brochure. You should have received a copy of that brochure. Please contact Mr. Wilkinson if you did not receive this brochure or if you have any questions about the contents of this supplement.

Additional information about William H. Wilkinson, III (IARD#2314953) is available on the SEC's website at www.adviserinfo.sec.gov.

January 7, 2021

Brochure Supplement (Part 2B of Form ADV)

Supervised Person Brochure

Principal Executive Officer - William H. Wilkinson III

- Year of birth: 1969

Educational Background and Business Experience

Educational Background:

- Northeastern University, Boston MA., BA, Business Management and International Business; 1992

Business Experience:

- 360 Wealth Management, Inc.; President/Investment Advisor Representative; 06/2003-Present
- Mortgage Loan Originator; 01/2008-12/2017
- Licensed Independent Insurance Agent; 12/1996-Present
- Geneos Wealth Management; Registered Representative; 06/2003-07/2005
- Round Hill Securities, Inc.; Vice President-Investments/Registered Representative; 02/1995-06/2003
- McLaughlin, Piven, Vogel Securities, Inc.; Senior Fixed Income Specialist/Registered Representative; 12/1992-02/1995

Professional Certifications

Employees have earned certifications and credentials that are required to be explained in further detail.

Certified Financial Planner (CFP®): Certified Financial Planner is a designation granted by the CFP Board. CFP® requirements include:

- Completion of a college-level program of study in personal financial planning, including completion of a financial plan development (capstone) course.
- Bachelor's degree (or higher) from a regionally-accredited college or university.
- Successful completion of the CFP® Certification Exam.
- Three-year qualifying full-time work experience or two-year qualifying apprenticeship that meets additional requirements.
- Adherence to the high standards of ethics and practice outlined in CFP Board's Standards of Professional Conduct and Code of Ethics.
- Successfully pass the Candidate Fitness Standards and background check.
- Abide by renewal requirements of \$325 certification fee per year and 30 hours of continuing education every two years.

Chartered Financial Consultant (ChFC): Chartered Financial Consultants are designations granted by the American College. ChFC certification requirements:

- Complete ChFC coursework within five years from the date of initial enrollment.

- Pass the exams for all required elective courses. You must achieve a minimum score of 70% to pass.
- Meet the experience requirements: Three years of business experience immediately preceding the date of use of the designation are required. An undergraduate or graduate degree from an accredited educational institution qualifies as one year of business experience.
- Take the Professional Ethics Pledge.
- When you achieve your ChFC designation, you must earn your recertification every two years.

Chartered Life Underwriter (CLU): Chartered Life Underwriters are designations granted by the American College to use the CLU mark. CLU requirements:

- Complete successfully CLU coursework 5 required and 3 elective
- Meet the experience requirements: Three years of business experience immediately preceding the date of use of the designation are required. An undergraduate or graduate degree from an accredited educational institution qualifies as one year of business experience.
- Take the Professional Ethics Pledge.
- When you achieve your CLU designation, you must earn 30 hours of continuing education credit every two years.

Accredited Investment Fiduciary (AIF): Accredited Investment Fiduciary designation is issued by fi360. AIF certification requirements:

- Accrue six hours of continuing professional education each renewal year with at least four coming from fi360-produced sources
- Attest to a code of ethics.
- Maintain current contact information in fi360's designee database
- Remit \$325 in annual dues

Chartered Advisor for Senior Living (CASL): Chartered Advisor for Senior Living designation is issued by the American. CASL certification requirements:

- Candidate must pass an examination for the following five required courses: Investments, Fundamentals of Estate Planning, Understanding the Older Client, Health and Long-Term Care Financing, Financial Decisions for Retirement
- Meet the experience requirements: Three years of business experience immediately preceding the date of use of the designation are required. An undergraduate or graduate degree from an accredited educational institution qualifies as one year of business experience and, when using formal education as qualifying experience, the remaining two years must immediately precede the date of the award.
- Take the Professional Ethics Pledge.
- When you achieve your CASL designation, you must complete 15 hours of continuing education every two years, with the additional condition that at least 10 of those

hours should be in course work directly related to the course work required to obtain this designation.

Disciplinary Information

Mr. Wilkinson does not have any disciplinary information to report.

Other Business Activities

William H. Wilkinson III, CFP® – President of 360 Wealth Management, Inc. is involved in other business activities which are related to the implementation of financial planning recommendations. Mr. Wilkinson is:

- A licensed Arizona resident insurance agent with authorized lines including Casualty Producer, Accident/Health Producer, Life Producer, Property Producer (AZ Department of Insurance License #140396).

Mr. Wilkinson may spend as much as 50% of his time in these related activities. These practices represent conflicts of interest because it gives Mr. Wilkinson an incentive to recommend products based on the compensation received. This conflict is mitigated by disclosures, procedures, and the firm's Fiduciary obligation to place the best interest of the client first and clients are not required to act on any recommendations.

Performance Based Fee Description

Managing Member William H Wilkinson III receives commissions from insurance companies for the insurance products he sells, but does not receive any performance based fees.

Supervision

As owner and President of 360 Wealth Management, Inc., William H. Wilkinson III has ultimate and direct supervisory responsibility over all personnel and functional areas of 360 Wealth Management, Inc., including those of himself. Mr. Wilkinson regularly reviews required reports and activities of 360 Wealth Management, Inc. and its personnel for compliance with applicable requirements.

William H. Wilkinson III may be reached at the following address and telephone numbers:

360 Wealth Management, Inc.
10037 E Dynamite Blvd., Suite C-110
Scottsdale, AZ 85262
480-588-8522

Requirements for State-Registered Advisors

Arbitration Claims: None to report.

Self-Regulatory Organization or Administrative Proceeding: None to report.

Bankruptcy Petition: None to report.