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

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8/8/2018

This brochure supplement provides information about Angela Rene Rehkop that supplements the Capital Asset Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Ken Evangelista at 517-339-7662 if you did not receive Capital Asset Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

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

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

**Full Legal Name:** Angela Rene Rehkop

**Born:** 1967

### **Education**

University of Georgia, Athens; Bachelor in Business Administration; 1989

### **Designations**

Certified Financial Planner® (CFP)<sup>1</sup>

Chartered Financial Consultant (ChFC)<sup>2</sup>

### **Business Experience**

Capital Asset Advisory Services, LLC; Investment Advisor Representative; from 07/2018 to Present

Scarlet Oak Financial Services; Investment Advisor Representative; from 07/2018 to Present

Geneos Wealth Management; Registered Representative; from 08/2018 to Present

LPL; Investment Advisor Representative and Registered Representative; from 08/2011 to 07/2018

## **Item 3 Disciplinary Information**

Ms. Rehkop has no reportable disciplinary history.

## **Item 4 Other Business Activities**

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

Ms. Rehkop is a registered representative of Geneos Wealth Management. Geneos is a securities broker-dealer (a member of FINRA, SIPC) and an investment adviser registered with the Securities and Exchange Commission. In addition, Ms. Rehkop is a licensed insurance agent, and sells fixed insurance products as an independent insurance agent. She may receive compensation for her activities as a registered representative or insurance agent.

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<sup>1</sup> The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards.

<sup>2</sup> The ChFC program is administered by the American College, Bryn Mawr, Pennsylvania. This designation has the same core curriculum as the CFP® designation, plus two or three additional elective courses that focus on various areas of personal financial planning. In addition to successful completion of an exam on areas of financial planning, including income tax, insurance, investment and estate planning, candidates are required to have a minimum of three (3) years' experience in a financial industry position.

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As a registered representative of Geneos, Ms. Rehkop may recommend securities or insurance products offered by Geneos. She may also receive commissions for insurance products sold through Capital Asset Insurance Services. Thus, a conflict of interest exists between the interests of Ms. Rehkop and those of our advisory clients. Our clients are under no obligation to purchase products recommended by Ms. Rehkop. No client is obligated to place securities transactions or purchase insurance through Geneos or to purchase insurance through any other firm represented by Ms. Rehkop.

**B. Non-Investment-Related Activities**

Ms. Rehkop may also recommend Life/Health and Fixed Insurance products through Scarlet Oak Financial Services.

**Item 5 Additional Compensation**

As noted above, Ms. Rehkop may receive compensation for her activities as a registered representative or insurance agent.

Ms. Rehkop is eligible to receive incentive awards (including prizes such as trips or bonuses) for recommending certain types of insurance policies or other investment products that she recommends.

While Ms. Rehkop endeavors at all times to put the interest of our clients first as part of our fiduciary duty, the possibility of receiving incentive awards creates a conflict of interest, and may affect her judgment when making recommendations.

**Item 6 Supervision**

**Supervisor:** Kenneth Evangelista

**Title:** Chief Compliance Officer

**Phone Number:** 517-339-7662

CAAS' procedures for supervising the activities of its investment adviser representatives include periodic reviews of branch offices and an annual review to ensure that compliance policies and procedures are being followed.