



Where Relationships Are the Difference

ADV PART 2A – APPENDIX 1 ADHESION MONEY MANAGEMENT WRAP FEE PROGRAM BROCHURE

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This Adhesion Money Management wrap fee program brochure provides clients with information about the qualifications and business practices of World Equity Group, Inc. that should be considered before investing in the program. If you have any questions about the contents of this brochure, please contact us at (847) 342-1700 or compliance@weg1.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

This brochure is given to program clients in addition to Form ADV Part 2. Form ADV Part 2 includes information that is not included in this brochure. Please review both documents carefully.

Additional information about World Equity Group also is available on the SEC's website at www.adviserinfo.sec.gov.

DATED
MARCH 31, 2017

MATERIAL CHANGES

The SEC adopted “Amendments to Form ADV” in July, 2010. This firm brochure is the disclosure document prepared according to the SEC’s new requirement and rules.

After our initial filing of this Wrap Brochure, World Equity Group, Inc. (“WEG”) will periodically provide Clients with a summary of new and/or updated information. WEG will inform clients of specific changes based on the content of the updated information.

Consistent with the new rules, WEG will provide clients a summary of any material changes to this and subsequent Wrap Brochures within 120 days of the close of our business’ fiscal year ending 12/31. WEG will inform Clients of specific changes based on the content of the updated information. Additionally, WEG will provide clients with other interim disclosures about material changes as may be necessary.

This section only describes any material changes made to this brochure since the last update. The last brochure was dated March 31, 2017. There have been no material changes.

DATED AUGUST 31, 2019

SERVICES AND PROGRAMS

World Equity Group, Inc. (“WEG”) is registered as a Registered Investment Adviser (“RIA”) with the Securities and Exchange Commission (“SEC”) and is also registered as a Broker/Dealer with the SEC and the Financial Industry Regulatory Authority (“FINRA”). WEG is licensed to conduct business as a Broker/Dealer and RIA in all 50 states, the District of Columbia, Puerto Rico and the U.S Virgin Islands.

WEG provides fee-based financial planning, and fee-based investment advisory portfolio and asset management services to help its Clients meet their financial planning and investment goals and objectives. WEG offers a variety of fee-based investment advisory asset management programs and services including actively managed stock and bond market portfolios and programs, asset allocation programs, and fee-based financial planning services.

Adhesion Money Management Wrap Fee Program

This brochure is given to clients in addition to World Equity Group’s Form ADV Part 2 Disclosure Brochure and the IARs Part 2B individual brochure. WEG’s Form ADV Part 2 includes additional information about WEG and its investment advisory business that is not included in this brochure. Clients should read each document carefully before investing. The Form ADV Part 2 Disclosure Brochure is provided to you by your Investment Adviser Representative or by contacting World Equity Group.

A wrap account program is a fee-based investment advisory program that “wraps” all of the fees, charges and expenses into one managed account. The Adhesion Money Management Program is a separately managed investment advisory wrap account program that is sponsored by WEG and managed by Adhesion Wealth Advisor Solutions (“Adhesion” or “Adhesion Program”). Clients’ accounts are held at TD Ameritrade, a qualified Custodian. The Adhesion Program uses third-party money managers and the WEG Investment Adviser Representative (“IAR”) to manage the Client’s assets in the account as described in more detail below.

The Investment Adviser Representative (“IAR”) will help the client to determine his or her current financial situation, liquidity needs, goals and investment objectives, risk tolerance, and investment time horizon. The IAR will use a Risk Tolerance Questionnaire to help determine the Client’s investment objectives, time horizon and tolerance for risk and then recommend an asset allocation portfolio for the Client in the Adhesion Program.

Portfolios may be invested in mutual funds, Exchange Traded Funds (“ETFs”), stocks, bonds and other securities either through models created by the third-party money managers or through individual mutual funds and ETFs recommended by the IAR.

IARs may use a variety of methods to analyze a client’s situation as well as economic factors to develop investment advice and recommendations. These methods include charting, fundamental analysis, technical analysis, cyclical analysis, quantitative analysis, qualitative analysis, and asset allocation. The IAR will inform clients of their methods of analysis, sources of information, and investment strategies used by the IAR in managing the Clients’ accounts. The Client may impose reasonable restrictions on investing in certain types of securities or industry sectors in the Adhesion Program, provided however that WEG may refuse to accept or continue to provide investment advisory services to the client if WEG determines such restrictions are unreasonable or impracticable.

The third-party money managers are granted discretionary authority by the Client to invest, allocate and rebalance the Client's account as the third-party money manager deems necessary in accordance with an investment model created and maintained by the third-party money manager. WEG IARs will also be granted discretion by the Client to invest, allocate and rebalance the Client's account among the selected third-party money managers or to change third-party money managers, and/or to recommend individual stocks and bonds, mutual funds and ETFs that are not a part of the third-party money manager's model as the IAR deems necessary based on prevailing market conditions and volatility, news, economic or political circumstances, and the individual characteristics and performance of the securities held in the client's portfolio. Clients may also request that their account be invested a certain way and be allocated or rebalanced at any time.

As a wrap program, Adhesion includes investment advice, portfolio management, asset allocation, rebalancing, transaction and execution, and custody all in one account. Adhesion implements trading instructions received from the third-party money managers. The IAR will execute transactions separately from the third-party money managers. The Adhesion Program's objective is to diversify the Client's account through asset allocation, and also manage account rebalancing with a view towards tax mitigation.

If the positions in the Client's account drift out of balance from the asset allocation model used by the third-party money manager, the account will be rebalanced as the money manager deems appropriate. The IAR may also rebalance the account as he or she deems appropriate. Clients may also elect to their accounts rebalanced on either a quarterly or annual basis through the Periodic Rebalancing option if the value of the assets in the Client's account in a particular asset allocation category deviates by more than 5% from the selected model. The third-party money manager or the IAR will have discretion to decide which securities within an asset allocation category need to be purchased or sold. The Client acknowledges and understands that the purchases and sales of securities will result in a taxable gain or taxable loss. Unless the Client has elected to have the account managed in a tax-efficient manner as described below, the Adhesion Program will not consider tax consequences when rebalancing the Client's account.

If the Client requests tax management, the Adhesion Program will manage the assets in the Client's account with the strategy to help minimize the potential tax consequences that would be the result of realizing short-term capital gains in the Client's account. The Tax Overlay Management option is available for an additional asset-based investment advisory fee. Using the Tax Overlay Management option may require Adhesion to execute transactions in the Client's account that differ from the transactions executed in other Clients' accounts where the Tax Overlay Management option has not been selected. If the Client selects the Tax Overlay Management and the Periodic Rebalancing options, Adhesion will consider the tax consequences when determining whether and how to rebalance the positions in the Client's account. The Client understands that if Adhesion determines that the tax consequences would outweigh the potential benefits of Periodic Rebalancing, the Client's account may not be rebalanced in accordance with the rebalancing schedule that the Client selected.

FEES AND COMPENSATION

Client's accounts in the Adhesion Money Management Program are charged an investment advisory fee for assets under management based on the value of all securities held in the Client's account.

The investment advisory fee covers:

1. The initial analysis and periodic review of the Client's personal financial situation, investment objectives, time horizon, and risk tolerance by the IAR
2. Discretionary management of the Client's account, asset allocation, rebalancing of the Client's account by the third-party money manager or the IAR
3. Investment advisory services, including the investment advisory fees charged by the third-party money managers and Adhesion
4. Account statements, trade execution and settlement, and custody of the Client's assets.

All account assets are held by WEG's Custodian, TD Ameritrade Institutional, a division of TD Ameritrade, Inc., member FINRA and SIPC, 4211 South 102nd St., Omaha, NE 68127.

The annual wrap program investment advisory fee charged to Clients is based on a percentage of the Custodian's reported value of the assets held within each individual Client's account(s). The total wrap investment advisory and program fee charged to the Client's account may fluctuate with changes to the third-party money managers. The total Adhesion Money Management Program wrap fee shall not exceed 250 basis points (2.50%).

The Adhesion Money Management Program investment advisory assets management wrap fee schedule is as follows:

Client Assets Under Management	WEG Platform Fee	Third-party Money Manager Fee	IAR Fee	Optional Tax Overlay Management Fee
\$25k - \$75k	.35%	*Varies	Negotiable	.12%
\$75k - \$750k	.30%	*Varies	Negotiable	.12%
\$750k+	.27%	*Varies	Negotiable	.08%

* For specific third-party money manager fees, please refer to the third-party money manager's investment advisory manager's fee, which is disclosed in the Adhesion Money Management Program's Agreement.

For accounts under \$50,000, the Adhesion Program offers an Exchange Traded Funds ("ETFs") Select Model portfolio. The Select Model portfolio offers access to institutionally priced ETFs.

The fee schedule for the ETF Select model is as follows:

Assets Under Management	Annual Fee
\$25,000 to \$50,000	1.5%

Fees are negotiable between the Client and IAR. All investment advisory and manager program fees are paid quarterly in advance. If the Client makes a written request to WEG to terminate the Adhesion Program agreement, the investment advisory and program fees will be prorated based on the termination date and the unearned portion of the fees will be returned to the Client.

The Adhesion Money Management Program may cost the Client more or less than the Client would pay if the investment advice, transaction and execution charges, and the account fees and charges for other services were purchased separately. Adhesion Program Clients should consider and evaluate the value of the Adhesion Program wrap account fees and costs and the services provided when making comparisons to other programs. The combination of the services provided in the Adhesion Program may or may not be available separately with other programs or the other options may require opening multiple accounts and they may charge separate fees. Certain third-party money managers may not be available individually to Clients outside the Adhesion Program because of minimum account sizes, fee schedules, geographic availability or other factors. Adhesion Program Clients should also consider and evaluate the amount of trading activity expected when selecting among different programs and assess the overall cost. Fee-based investment advisory programs typically assume a certain amount of trading activity in the Client's account. Therefore, prolonged periods of holding cash positions, limited trading activity and inactivity or limited asset rebalancing which generally occur with holding individual bond positions may result in higher fees than if the account was not holding cash positions and/or if the bonds were executed on a commission basis separately for each transaction.

WEG and its IAR who recommends the Adhesion Money Management Program receives a part of the investment advisory fees as a result of a Client's participation in the Adhesion Program. The amount of the investment advisory fees received may be more than what WEG and its IAR, would receive if the Adhesion Client paid separately for investment advice, transaction and execution charges and other services. Therefore, the WEG and its IAR have a financial incentive and a conflict of interest to recommend the Adhesion Program over other programs and services.

WEG may use both Compass, an affiliated internal money manager and/or third-party money managers for the Adhesion Program. Each money manager receives a portion of the WEG investment advisory fee. The use or non-use of Compass or third-party money managers does not change the amount charged by the IAR or the investment advisory fee charged by WEG to the Client.

OTHER FEES

The annual investment advisory fee percentages shown under the Adhesion Program is all inclusive, wrapping transaction and execution costs, investment advisory fees and other fees and charges into one account. However, the Adhesion Program investment advisory fee does not pay for any of the following:

1. any stock exchange or SEC fees;
2. certain transfer taxes;
3. service or account charges, including electronic fund and wire transfer fees, auction fees, debit balances, margin interest, certain odd-lot differentials and mutual fund short-term redemption fees; and

4. transaction and execution costs associated with non-eligible assets held in the Client's account or with securities and other property held outside of the Client's Adhesion Program managed account.

All investment advisory fees paid to WEG for management services are separate from any fees, charges and expenses that are charged to shareholders of mutual fund shares by the investment company or by third-party investment advisers managing the mutual fund portfolios. These expenses generally include fund management fees and other fund expenses, including, but not limited to: 12b-1 fees, redemption fees, account maintenance fees, sales load charges, contingent deferred sales charges, and other miscellaneous fees. A complete explanation of these charges and expenses is contained in each mutual fund's prospectus. Clients should read the prospectus carefully prior to investing.

A Client could invest in a money market fund or mutual funds directly without incurring the investment advisory fees charged for participation in the Adhesion program. In addition, for certain accounts that may hold a high percentage of the portfolio in money market or mutual funds, other investment advisory programs may be available through WEG for a lower investment advisory fee or it may cost less to purchase mutual funds on a commission basis in a commission-based brokerage account or the mutual funds may be able to be purchased at Net Asset Value ("NAV"). Adhesion Program Clients will receive a current prospectus for each money market and mutual fund purchased.

Exchange Traded Funds and Mutual Funds

Shares of Exchange Traded Funds ("ETFs") held in client accounts are purchased and sold directly on one of the stock exchanges unlike open-end mutual funds, which are purchased and sold directly from the mutual fund company. The price of ETFs shares will fluctuate with market conditions affecting the underlying Net Asset Value ("NAV") per share value of the ETFs. Therefore, ETFs shares will trade at a discount or at a premium to their NAV on a daily basis.

All fees paid to WEG for investment advisory services are separate and distinct from the fees and expenses that may be charged by ETFs or mutual funds to their shareholders. These fees and expenses are described in each ETFs or mutual fund's prospectus. Therefore, the Client should review both the fees charged by the ETFs, mutual funds and WEG fees carefully to fully understand the total amount of fees that will be paid by the Client.

Certain ETFs pay investment advisory fees to the Investment Advisers, which reduces the NAV of the ETFs. Unit Investment Trusts ("UITs") often have fixed portfolios that are not actively traded or managed by the third-party money manager. However, all ETFs and UITs do incur charges and expenses related to the management and administration of the ETF or UITs. The charges and expenses are deducted from the ETFs and UITs, and therefore they affect the overall return of the investment.

ACCOUNT REQUIREMENTS AND TYPES OF CLIENTS

WEG primarily provides investment advice and investment advisory services to individuals, pension and/or profit-sharing plans, trusts, estates, charitable organizations, corporations and other business entities. Requirements for opening an account vary depending on the investment advisory program selected, but WEG generally has minimum account size requirements of between \$25,000 and \$100,000 depending on type of program. The third-party money managers may at their discretion accept accounts below the minimum required amount. Account minimums are discussed in more detail in each third-party money manager's Form ADV or other disclosure document.

PORTFOLIO MANAGER SELECTION AND EVALUATION

Third-party money managers are selected for the Adhesion Program based primarily on their specific type of investment model, strategy, risk management discipline, performance, and how the model aligns with other models in the Adhesion Program. Additional considerations on whether to include a manager in the Adhesion Program are based on passing due diligence, legal and regulatory background checks, through interviews and meetings with the third-party money manager, and verifying compliance with regulatory standards. WEG reviews manager performance data at least annually.

The WEG sponsored Adhesion Money Management Program provides our Investment Adviser Representatives with access to third-party investment advisory services offered by various turnkey asset management providers and third-party managed account providers. For more information regarding each third-party money manager, please refer to the third-party money manager's Form ADV or other disclosure document.

WEG may provide information to the Client regarding the retention or replacement of a certain third-party money manager if the manager changes its management style or if the Client's financial situation, investment objectives, time horizon and/or risk tolerance changes. WEG may replace managers in the Adhesion Program if the manager's model is changed or WEG believes another manager would be more appropriate for the Adhesion Program.

Each Client has the ability to change between the managers based upon the Client's stated specific investment objectives, time horizon, risk tolerance and goals. The IAR assists the Client in selecting appropriate managers based upon the specific financial situation and needs of the Client.

Neither WEG or any of its IARs assumes responsibility for the unaffiliated third-party money managers, including their performance, performance reporting, or compliance with laws or regulations. Neither WEG, or any third party independently verifies the performance information provided by the third-party money managers to determine its accuracy or compliance with presentation standards. Performance information may not be calculated on a uniform and consistent basis. Adhesion Program Clients are advised and should understand that:

- (a) such manager's past performance is no guarantee of future results;
- (b) there are market and/or interest rate risks which may adversely affect any manager's objectives and strategies and could cause a loss in a client's account, and
- (c) any risk parameters or comparative index selections provided for accounts are guidelines only; there is no guarantee that they will be met or exceeded. Once funds are allocated to a manager, the manager will manage the funds in accordance with its model.

One of the third-party money manager options available to clients under the Adhesion Money Management Program is Compass Active Tactical Management ("Compass"), which is managed by WEG owners and officers. All other third-party money manager options available under the program are Registered Investment Advisers that are unaffiliated with WEG. The Compass program is also available outside of the Adhesion Program. However, if the Client chooses to use Compass outside of the Adhesion Program, the Client will not receive other benefits of the Adhesion Program, including the ability to allocate and reallocate to other managers within an account.

Because Compass is managed and controlled by owners and officers WEG, WEG and its IAR have an inherent conflict of interest when recommending Compass as a money manager under the Adhesion Program. When Compass is selected in the Adhesion Program, WEG receives that portion of the investment advisory fee that would otherwise be paid to an unaffiliated third-party money manager as well as the underlying investment advisory asset management fee. Therefore, WEG and its IAR will receive additional compensation when recommending Compass as compared to the other possible unaffiliated third-party money managers in the Adhesion Program that may have similar models, strategies, investment performance, investment style and track records where the Client be charged lower investment advisory fees.

Other Conflicts of Interest

WEG and its IARs may purchase or sell the same securities or different securities from those recommended to clients for their personal accounts. It is the policy of WEG that no person associated with the firm may purchase or sell any security immediately prior to a transaction(s) being implemented for an investment advisory account in order to prevent such employees from benefiting from transactions placed on behalf of investment advisory accounts. Because of the single fee charged to a Wrap Program account, WEG may be regarded as having a conflict in interest as it may realize a greater profit on a Wrap Program account with a relatively low rate of portfolio turnover compared to other types of accounts, assuming the same level of fees.

Frequency and Nature of Reviews

World Equity Group's IARs review their Clients' accounts and performance and meet with each Client on an ongoing periodic basis, but no less than annually. IARs also may conduct additional reviews and meet with the Client more frequently such as monthly or quarterly, depending on the type of investment advisory program. WEG conducts periodic reviews of the money managers to evaluate their performance compared to the other money managers and to the Client's stated investment objective, time horizon and risk tolerance.

Reports Provided to Clients

Clients receive a quarterly performance reports from WEG monthly statements from the Custodian confirmations of all transactions executed in the Client's account, and a year-end tax summary. Additional reports may be provided depending on the type of investment advisory program and at the request of the Client. All account statements are sent to the Client's address of record directly from the Custodian.

CLIENT CONTACT & INFORMATION PROVIDED TO PORTFOLIO MANAGERS

If a Client wishes to have a consultation with one of the third-party money managers, the request must be made through his or her IAR. The IAR will set-up a conference call with the money manager.

Client information provided to the money managers includes the client's name, address, account registration status, and contact information. Updated information will be provided to the money managers as changes are made.

ADDITIONAL INFORMATION

Investment Risk

All investment strategies involve risk. There can be no assurance that a positive return will be obtained in any managed investment account program. Neither WEG or its IARs or the third-party money managers can guarantee the investment performance in the account, guarantee any specific level of performance, guarantee that investment decisions, strategies or that the overall management of the account will be successful. Any investment decisions the money managers or IAR may make are subject to various market, currency, economic, political, interest rate and business risks and may not necessarily be profitable, and are subject to investment risk, including possible loss of principal.

Financial Industry Affiliations

Investment Adviser Representatives ("IARs") of WEG are dually licensed as registered representatives of World Equity Group, Inc. Most are also licensed insurance agents representing various insurance companies. As such, IARs are able to receive separate, yet customary commission compensation resulting from implementing securities and insurance product transactions on behalf of investment advisory clients. The clients are not under any obligation to engage the IAR when considering whether to implement any investment advisory recommendations. The implementation of any or all recommendations is solely at the discretion of the client.

While WEG and its IARs endeavor at all times to put the interest of the clients first as part of our fiduciary duty, clients should be aware that the receipt of additional compensation itself creates a conflict of interest, and may affect the judgment of IARs when making recommendations.

Other Outside Business Activities

Some IARs own or are affiliated with independent Registered Investment Adviser (“RIA”) firms. These firms are not affiliated with WEG and their activities of are not supervised by WEG. IARs that own or are affiliated with an independent RIA may only offer and provide similar or different programs than those offered by WEG. The programs may cost more or less than the Adhesion Program.

Fees for financial planning services provided by the IAR through their own independent RIA are separate and distinct from any fees paid to WEG in their capacity as an IAR of WEG.

Clients that engage an IAR through an independent RIA firm will receive a copy of that firm’s disclosure documents and execute a Financial Planning Client agreement specifying the financial planning services to be provided and fees to be charged by the independent RIA.

Certain IARs may have other business activities and offer services, such as tax preparation, accounting, legal, real estate, employee benefits consulting, or other businesses, that are outside business activities from their registration as an IAR of WEG. WEG does not supervise or receive compensation from these other outside business activities. IARs engaging in these other outside business activities do so independently of their registration with WEG.

WEG may also enter into certain arrangements to offer brokerage and investment advisory services to the clients of independent unaffiliated financial institutions (credit unions, credit union service organizations, banks and savings banks). A portion of the client’s investment advisory fee will be paid by WEG to the financial institution pursuant to a fee sharing arrangement as long as the agreement with the institution is in effect. The financial institution does not provide any investment advisory services to the client.

Disciplinary Information

On August 23, 2018, World Equity Group signed a letter of Acceptance, Waiver and Consent (“AWC”) with FINRA agreeing to a \$100,000 fine and was ordered to pay restitution in the amount of not less \$380,000 to customers who purchased L-share class variable annuity contracts with long-term income riders from the period of June 1, 2013 through May 31, 2018. Additionally, from the period of April 2013 through March of 2017, the firm failed to establish, maintain and enforce a supervisory system and written supervisory procedures reasonably designed to ensure that representatives’ recommendation of variable annuities complied with applicable securities laws and regulations and FINRA rules.

On March 1, 2017, World Equity Group signed a letter of Acceptance, Waiver and Consent (“AWC”) with FINRA and was censured and fined \$15,000 for failing to report 83 TRACE Eligible corporate debt securities transaction within the time frame required by FINRA Rule 6730.

On April 25, 2016, World Equity Group signed a letter of Acceptance, Waiver and Consent (“AWC”) with FINRA and was censured and fined \$50,000. WEG failed to establish and maintain a supervisory program designed to identify and prevent potentially unsuitable excessive trading of equity securities.

On February 3, 2015, World Equity Group signed a letter of Acceptance, Waiver and Consent with FINRA and was censured and fined \$225,000. WEG failed to implement a reasonably designed supervisory procedures regarding Anti-Money Laundering (“AML”), email retention, customer due

diligence, trading non-traditional Exchange Traded Funds (“ETFs”), private placement due diligence, non-traded Real Estate Investment Trusts (“REITs”) due diligence, and house account supervision.

On September 25, 2014, World Equity Group signed a letter of Acceptance, Waiver and Consent (“AWC”) with FINRA and censured and fined \$7,500 for failing to report transactions in the Trade Reporting and Compliance Engine (“TRACE”) for Eligible Securitized Products to TRACE within the time period required by Rule 6730.

On December 12, 2011, World Equity Group signed a letter of Acceptance, Waiver and Consent (“AWC”) with FINRA and was censured and fined \$15,000. For failing to transmit all of its reportable order events to the Order Audit Trail System (“OATS”) for more than a year. The firm did not qualify for exclusion from the OATS reporting requirements because it routed its orders through more than a single reporting member.

On December 13, 2011, World Equity Group and Mr. Richard Babjak, President and an owner of WEG, signed a letter of Acceptance, Waiver and Consent (“AWC”) where the firm and Mr. Babjak were fined and censured \$50,000 jointly and severally. The AWC alleged specific deficiencies in regard to the supervision of advertisements, communications with the public, licensing and registration occurring between December 2007 and November 2008 and involved the supervision of advertising activities of one representative relative to non-securities insurance products. The AWC was signed to settle the alleged rules violations and was consented to without admitting or denying the findings. WEG and Mr. Babjak were censured and fined jointly and severally. WEG and Mr. Babjak worked cooperatively and proactively with FINRA in connection with the issues and the AWC.

On November 22, 2006, the National Association of Securities Dealers (“NASD”) alleged that Mark Lishchynsky failed to ensure that his previous member firm’s offsite FINOP was aware of at least \$31,602.11 worth of liabilities and that the liabilities were properly recorded on the firm’s books and records in violation of NASD Rule 2110. Without admitting or denying the findings, Mr. Lishchynsky consented to the described sanction and to the entry of findings and was fined \$5,000. Subsequently, Mr. Lishchynsky was late with the final payment of the monetary fine and as a result, his license was revoked until final payment was made. The revocation occurred on June 16, 2009, and was lifted on June 19, 2009.

Additional disciplinary information about the above items can be found on the SEC’s website at www.adviserinfo.sec.gov. The searchable IARD/CRD number for WEG is 29087.