

**Form ADV Part 2B – Brochure Supplement  
Item 1: Cover Page  
October 2021**

**Western Wealth Management LLC  
Doing business as**

**Fortunate Family Office**

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[www.fortunatfamilyoffice.com](http://www.fortunatfamilyoffice.com)

**Wade Olson  
CRD#5631417**

Firm Contact: G.E. Buenning, Chief Compliance Officer

This brochure supplement provides information about Wade Olson that supplements our brochure. You should have received a copy of that brochure. Please contact G.E. Buenning, Chief Compliance Officer if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Wade Olson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and/or FINRA's Broker Check at [www.finra.org/brokercheck](http://www.finra.org/brokercheck).

## Item 2: Educational Background & Business Experience

### **Wade Olson**

Year of Birth: 1975

#### **Educational Background:**

- 1998; Colorado State University; B.S. Business and B.A. Journalism

#### **Business Background:**

- 04/2016 – Present; Western Wealth Management LLC; Investment Adviser Representative
- 04/2016 – Present; LPL Financial; Registered Representative
- 01/2013 – 03/2016; Cetera Advisor Networks; Financial Advisor
- 02/2012 – 12/2012; Financial Network; Registered Representative
- 01/2009 – 02/2012; GCG Financial Inc.; Agent
- 01/2009 – 02/2012; Minnesota Life Insurance Co.; Agent
- 01/2009 – 02/2012; Securian Financial Services, Inc.; Registered Representative

#### **Exams & Professional Designations:**

- 01/2012 – Certified Financial Planner
- 02/2009 – Series 66
- 01/2009 – Series 7
- 01/2009 – Life & Health Insurance License

#### **CFP® - Certified Financial Planner™:**

The federally registered CFP marks are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its high standard of professional education, stringent code of conduct and standards of practice and ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university, pass the comprehensive CFP® Certification Examination, Complete at least three years of full-time financial planning-related experience and agree to be bound by CFP Board’s *Standards of Professional Conduct*.

Individuals who become certified must complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial industry and renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to your evaluation of Mr. Olson. There may be items that are contained on [www.brokercheck.finra.org](http://www.brokercheck.finra.org) or [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) that you may wish to review and consider in your evaluation of your advisor's background.

### **Item 4: Other Business Activities**

Mr. Olson is a Registered Representative of LPL Financial, member FINRA/SIPC. As a Registered Representative, Mr. Olson may solicit, offer and sell securities through LPL Financial and may receive separate, yet normal and customary commission compensation as a result of executing purchases and sales of brokerage transactions on behalf of investment advisory clients. The client is under no obligation to purchase or sell securities through Mr. Olson or LPL Financial. In addition, Mr. Olson may receive other compensation such as mutual fund or money market 12b-1 fees (marketing fees) and trail commissions from variable insurance products. The potential for receipt of commissions and other compensation may create a conflict of interest and provide an incentive for Mr. Olson to recommend investment products based on the compensation received, rather than on the client's needs. WWM addresses this conflict of interest by requiring Mr. Olson to disclose to the client at the time a brokerage account is opened through LPL Financial the nature of the transaction or relationship, his role as an LPL Registered Representative, and any compensation including commissions and 12b-1 fees that may be paid by the client and/or received by Mr. Olson.

Mr. Olson is a licensed insurance agent/broker. He may offer insurance products and receive normal and customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation he may earn and may not necessarily be in the best interests of the client. In order to minimize this conflict of interest, Mr. Olson will place client interests ahead of his own interests and adhere to our firm's Code of Ethics. Clients are informed they are not obligated to purchase these products.

Mr. Olson conducts the above investment related activities and may also conduct other business or investment related activities under the Doing Business As ("DBA") names of DC & Associates and/or Fortunate Family Office. DC & Associates and Fortunate Family Office are separate entities from and are not owned or controlled by Western Wealth Management or LPL Financial.

Mr. Olson 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**

Mr. Olson may receive economic benefits from persons other than clients in connection with advisory services. Please ask your financial advisor about whether he receives any of the forms of additional compensation outlined below.

Your Advisor may receive compensation from LPL Financial in different ways, such as payments based on production, awards of stock options to purchase shares of LPL's parent company, LPL Financial Holdings Inc., reimbursement of fees that your financial advisor pays to LPL for items such as administrative services, and other things of value such as free or reduced-cost marketing materials, payments in connection with the transition of association from another broker/dealer or investment advisor firm to LPL, advances of advisory fees, or attendance at LPL's national conference or top producer forums and events. LPL may pay your financial advisor this compensation based on his overall business production and/or on the amount of assets custodied at LPL Financial. Therefore,

the amount of this compensation may be more than what your financial advisor would receive if the client participated in other programs or paid separately for investment advice, brokerage and other client services.

Therefore, your financial advisor may have a financial incentive to recommend an advisory program over other programs and services. However, your financial advisor may only recommend a program or service that he believes is suitable for you.

Mr. Olson may be eligible to receive cash and/or non-cash compensation from product sponsors for recommending certain types of insurance or other investment products. Compensation may include such items as gifts valued at less than \$100 annually, an occasional dinner or ticket to a sporting event, or reimbursement in connection with educational and training meetings or marketing or advertising initiatives. Product sponsors may also pay for education or training events that they may attend. While Western Wealth Management and LPL Financial endeavor at all times to put the interests of our clients first as part of our fiduciary obligation, the possibility of receiving cash and non-cash compensation could create a conflict of interest when recommending certain products.

### **Item 6: Supervision**

G.E. Buenning, Chief Compliance Officer of Western Wealth Management LLC, supervises and monitors Mr. Olson's activities on a regular basis. Mr. Buenning reviews all outgoing correspondence for written financial advice that Mr. Olson provides to his clients. Please contact Mr. Buenning if you have any questions about Mr. Olson's brochure supplement at (303) 393-2404.