

Carmen M. Petote

McKinley Carter Wealth Services, Inc.

2100 Market Street
Wheeling, WV 26003
www.mc-ws.com
(304) 230-2400

April 2022

This Brochure Supplement provides information about Carmen M. Petote that supplements the Disclosure Brochure of McKinley Carter Wealth Services, Inc. (hereinafter “MCWS”), a copy of which you should have received. Please contact MCWS’s Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Carmen M. Petote is available on the SEC’s website at www.adviserinfo.sec.gov

McKinley Carter Wealth Services, a Registered Investment Adviser

2100 Market Street, Wheeling, WV 26003 | (304) 230-2400

www.mc-ws.com | www.smartforyourmoney.com

Item 2. Educational Background and Business Experience

Born 1956

Post-Secondary Education

Edinboro University of Pennsylvania | BS Music Education (1978)

Recent Business Background

McKinley Carter Wealth Services, Inc. | Associate Financial Strategist | April 2022 – Present

Allegiance Financial Advisors, Inc. | President & Chief Compliance Officer | January 1994 – March 2022

PKS Investments | Registered Representative | July 2012 – July 2014

Allegheny Investments Ltd. | Registered Representative | December 1993 - July 2012

Independent Licensed Insurance Agent | September 1984 - March 2022

Professional Designations

Carmen M. Petote holds the professional designation of CERTIFIED FINANCIAL PLANNER™ (“CFP®”).

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. (the “CFP Board”) to individuals who meet its education, examination, experience and ethics requirements. Eligible candidates are generally required to have three years of financial planning related experience and possess a bachelor’s degree from an accredited U.S. college or university. Certificants are further required to complete a CFP Board-Registered Education Program (or possess a qualifying professional credential), clear a personal and professional background check, and pass the CFP® Certification Examination, a six-hour multiple choice exam divided into two separate sessions. In order to maintain the certification, CFP® designees must also complete at least 30 hours of continuing education every two years on an ongoing basis.

Mr. Petote has taught the CFP Certification Program (described above) at Robert Morris University and Duquesne University and is a current member, a past President and has held various board positions with the Financial Planning Association and/or its predecessors. Mr. Petote has also conducted educational workshops on financial and retirement planning, and is a former co-host of the weekly radio show “Your Money Matters.”

Item 3. Disciplinary Information

MCWS is required to disclose information regarding any legal or disciplinary events material to a client’s evaluation of Carmen M. Petote. MCWS has no information to disclose in relation to this Item.

Item 4. Other Business Activities

MCWS is required to disclose information regarding any investment-related business or occupation in which Carmen M. Petote is actively engaged. MCWS has no information to disclose in relation to this Item.

Item 5. Additional Compensation

MCWS is required to disclose information regarding any arrangement under which Carmen M. Petote receives an economic benefit from someone other than a client for providing investment advisory services. Carmen M. Petote participates in MCWS Business Incentive Program. As such, he is eligible to receive additional compensation from MCWS for referring and closing new client business. In these situations, Carmen M. Petote may receive payment based on projected revenue attributed to the new business.

Item 6. Supervision

Brian Gongaware, Chief Compliance Officer, is generally responsible for supervising Carmen's advisory activities on behalf of MCWS. The telephone number to reach Brian Gongaware is (724) 940-4400.

MCWS supervises its personnel and the investments made in client accounts. MCWS monitors the investments recommended by Carmen M. Petote to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. MCWS periodically reviews the advisory activities of Carmen M. Petote, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Carmen M. Petote.