

# **David H. McKinley**

## **McKinley Carter Wealth Services, Inc.**

2100 Market Street  
Wheeling, WV 26003  
[www.mc-ws.com](http://www.mc-ws.com)  
(304) 230-2400

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September 2018

This Brochure Supplement provides information about David H. McKinley 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 David H. McKinley is available on the SEC’s website at [www.adviserinfo.sec.gov](http://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](http://www.mc-ws.com) | [www.smartforyourmoney.com](http://www.smartforyourmoney.com) | [www.mckinleycarter.com](http://www.mckinleycarter.com)

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

**David H. McKinley**  
Born 1970

### **Post-Secondary Education**

West Liberty University | BS, Business Administration | 1995

### **Recent Business Background**

McKinley Carter Wealth Services, Inc. | President | November 2003 – Present

### **Professional Designation**

David H. McKinley holds the professional designation of CERTIFIED FINANCIAL PLANNER™ (“CFP®”). The CFP®, CERTIFIED FINANCIAL PLANNER™ and certification marks are financial planning credentials awarded by Certified Financial Planner Board of Standards Inc. (“CFP Board”) to individuals who meet its education, examination, work experience, and ethics requirements. Eligible candidates must have at least a bachelor’s degree (or its equivalent) in any discipline from an accredited college or university in order to obtain a CFP® certification. The candidate also must pass an examination, have three years of personal financial planning experience, and meet the CFP Board’s ethical requirements. To maintain the certification, the CFP Board requires individuals to complete 30 hours of continuing education hours every two years and renew an agreement to be bound by its Standards of Professional Conduct.

For additional information about this credential, please refer directly to the website of the issuing organization.

## **Item 3. Disciplinary Information**

MCWS is required to disclose the pertinent facts regarding any legal or disciplinary events material to a client’s evaluation of David H. McKinley. 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 David H. McKinley is actively engaged. MCWS has no information to disclose in relation to this Item.

## **Item 5. Additional Compensation**

MCWS is required to describe any arrangement under which David H. McKinley receives an economic benefit for providing advisory services from someone that is not a client of MCWS.

### **New Business Incentive Program**

David H. McKinley participates in MCWS's New Business Incentive Program. As such, he is eligible to receive additional compensation from MCWS for referring and closing new client business. In these situations, David H. McKinley 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 David'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 David H McKinley 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 David H. McKinley, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by David H. McKinley.