

# Tyrone C. Phillippi

## McKinley Carter Wealth Services, Inc.

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This Brochure Supplement provides information about Tyrone C. Phillippi 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 Tyrone C. Phillippi 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 | [www.smartforyourmoney.com](http://www.smartforyourmoney.com) | [www.mckinleycarter.com](http://www.mckinleycarter.com)

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

Tyrone C. Phillippi

Born 1968

### **Post-Secondary Education**

Wright State University | B.S., Financial Services | 1992

### **Recent Business Background**

McKinley Carter Wealth Services, Inc. | Regional Managing Director and  
Financial Strategist | Sep 2020 – Present

LifePlan Financial Group, Inc | President | Jan 2006 – Aug 2020

LifePlan Financial Group, Inc. | Vice President | Jan 2002 – Jan 2006

LifePlan Financial Group, Inc | Financial Planner / Investment Advisor | Nov  
1994 – Dec 2001

### **Professional Designation**

Tyrone C. Phillippi holds the professional designation of Certified Financial Planner (“CFP<sup>®</sup>”).

The CFP<sup>®</sup> is 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<sup>®</sup> 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 information regarding any legal or disciplinary events material to a client's evaluation of Tyrone C. Phillippi. 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 Tyrone C. Phillippi 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 Tyrone C. Phillippi receives an economic benefit from someone other than a client for providing investment advisory services. Tyrone C. Phillippi 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, Tyrone C. Phillippi may receive payment based on projected revenue attributed to the new business.

## **Item 6. Supervision**

David H. McKinley, Chief Executive Officer, is generally responsible for supervising Tyrone C. Phillippi's advisory activities on behalf of MCWS. The telephone number to reach David H. McKinley is (304) 230- 2400.

MCWS supervises its personnel and the investments made in client accounts. MCWS monitors the investments recommended by Tyrone C. Phillippi 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 Tyrone C. Phillippi, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Tyrone C. Phillippi.