

This brochure supplement provides information about Christopher Charles Drouin that supplements the Beyond Wealth Management Group, LLC brochure. You should have received a copy of that brochure. Please contact Christopher Charles Drouin if you did not receive Beyond Wealth Management Group, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Christopher Charles Drouin is also available on the SEC's website at www.adviserinfo.sec.gov.

Beyond Wealth Management Group, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Christopher Charles Drouin

Personal CRD Number: 4541093

Investment Adviser Representative

Beyond Wealth Management Group, LLC
101 Main St Rear Building
New Paltz, NY 12561
(845) 750-6213
cdrouin@beyondwm.com

UPDATED: 10/09/2018

Item 2: Educational Background and Business Experience

Name: Christopher Charles Drouin **Born:** 1974

Educational Background and Professional Designations:

Education:

BA Psychology, State University of New York at New Paltz - 1996

Business Background:

02/2017 - Present Managing Member & Chief Compliance Officer
Beyond Wealth Management, LLC

02/2002 - 02/2018 Financial Planner/ Advisor & Insurance Agent
Mutual of Omaha

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Christopher Charles Drouin is a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission or other compensation and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. Beyond Wealth Management Group, LLC always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients always have the right to decide whether or not to utilize the services of any Beyond Wealth Management Group, LLC representative in such individual's outside capacities.

Christopher Charles Drouin is a Managing Member at Beyond Risk Management Group, LLC an Insurance Agency, located at 101 Main St, PO Box 324. He also acts as President/CEO. Business started on March 22, 2018. He devotes 5 hours during and outside trading hours. The expected percentage of his total yearly compensation is 5% that has been derived from the business. From time to time, he may offer clients advice or products from those activities and clients should be aware that these services may involve a conflict of interest. Beyond Risk Management Group, LLC always acts in the best interest of the client and clients always have the right to decide whether or not to utilize the services of any representative of Beyond Risk Management Group, LLC in such individual's outside capacities.

Item 5: Additional Compensation

Christopher Charles Drouin does not receive any economic benefit from any person, company, or organization, other than Beyond Wealth Management Group, LLC in exchange for providing clients advisory services through Beyond Wealth Management Group, LLC.

Item 6: Supervision

As the Chief Compliance Officer of Beyond Wealth Management Group, LLC, Christopher Charles Drouin supervises all activities of the firm. Christopher Charles Drouin's contact information is on the cover page of this disclosure document. Christopher Charles Drouin adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

This brochure supplement provides information about Peter Banta that supplements the Beyond Wealth Management Group, LLC brochure. You should have received a copy of that brochure. Please contact Peter Banta if you did not receive Beyond Wealth Management Group, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Peter Banta is also available on the SEC's website at www.adviserinfo.sec.gov.

Beyond Wealth Management Group, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Peter Banta

Personal CRD Number: 7959575
Investment Adviser Representative

Beyond Wealth Management Group, LLC
101 Main Street Rear Building
New Paltz, NY 12561
(845) 750-6213
pbanta@beyondwm.com

UPDATED: 08/14/2024

Item 2: Educational Background and Business Experience

Name: Peter Banta

Born: 1997

Educational Background and Professional Designations:

Education:

Masters Accounting, SUNY Binghamton - 2020

Bachelors Accounting, SUNY New Paltz - 2019

N/A Liberal Arts, SUNY Westchester Community College - 2016

N/A Spanish, SUNY Ulster Community College - 2018

Professional Designations:

AIF® - Accredited Investment Fiduciary® - July 2024

- The AIF designation, awarded by the Center for Fiduciary Studies, an fi360 company, demonstrates the focus on all the components of a comprehensive investment process, related fiduciary standards of care, and commitment to excellence.
- AIF designees must complete 6 steps to earn the designation:
 1. Submit registration and fee; 2. successfully complete a specialized program on investment fiduciary standards of care; 3. pass a comprehensive examination; 4. upon passing, submit the accreditation application and fee; 5. complete annual continuing educational requirements; 6. pledge to abide by the designation's code of ethics.

CPA - Certified Public Accountant - January 2022

- CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination.
- In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

In addition to the Code of Professional Conduct, AICPA members who provide personal financial planning services are required to follow the Statement on Standards in Personal Financial Planning Services (SSPFPS).

Business Background:

07/2024 - Present	Investment Adviser Representative Beyond Wealth Management Group, LLC
06/2022 - 07/2024	Project Accountant KC Engineering and Land Surveying
03/2021 - 06/2022	Associate RBT CPA's, LLP
01/2021 - 03/2021	Associate BDO USA, LLP
09/2020 - 12/2020	Assistant Aquaduct Plumbing Services
08/2020 - 08/2020	Cashier Shoprite
05/2020 - 07/2020	N/A Unemployed
08/2019 - 05/2020	N/A Student
06/2019 - 08/2019	Intern BDO USA, LLP
05/2019 - 08/2019	Intern Beyond Wealth Management
08/2018 - 05/2019	N/A Student
05/2018 - 07/2018	Intern

	Target
08/2017 - 05/2018	N/A Student
05/2017 - 08/2017	Usher Hudson Valley Renegades
08/2016 - 05/2017	N/A Student
05/2016 - 08/2016	Usher Hudson Valley Renegades
06/2015 - 05/2016	N/A Student
01/2014 - 06/2015	N/A Student

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Peter Banta is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

Peter Banta does not receive any economic benefit from any person, company, or organization, other than Beyond Wealth Management Group, LLC in exchange for providing clients advisory services through Beyond Wealth Management Group, LLC.

Item 6: Supervision

As a representative of Beyond Wealth Management Group, LLC, Peter Banta is supervised by Christopher Drouin, the firm's Chief Compliance Officer. Christopher Drouin is responsible for ensuring that Peter Banta adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Christopher Drouin is (845) 750-6213.

This brochure supplement provides information about David W Cross that supplements the Beyond Wealth Management Group, LLC brochure. You should have received a copy of that brochure. Please contact David W Cross if you did not receive Beyond Wealth Management Group, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about David W Cross is also available on the SEC's website at www.adviserinfo.sec.gov.

Beyond Wealth Management Group, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

David W Cross

Personal CRD Number: 2946272

Investment Adviser Representative

Beyond Wealth Management Group, LLC
101 Main Street Rear Building
New Paltz, NY 12561
(845) 750-6213
dcross@beyondwm.com

UPDATED: 01/08/2019

Item 2: Educational Background and Business Experience

Name: David W Cross **Born:** 1955

Educational Background and Professional Designations:

Education:

BS Hotel Restaurant Administration, University Nevada at Las Vegas - 1980
BS Business Admin, Ithaca College - 1978

Business Background:

02/2019 - Present	Investment Adviser Representative Beyond Wealth Management Group, LLC
10/2018 - 01/2019	Chief Strategy Officer Beyond Wealth Management Group LLC
08/2015 - 10/2018	Retired Retired
07/2015 - 08/2015	District Sales Manager Mass Mutual
10/1997 - 07/2015	District Sales Manager Mutual of Mutual

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

David W Cross is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

David W Cross does not receive any economic benefit from any person, company, or organization, other than Beyond Wealth Management Group, LLC in exchange for providing clients advisory services through Beyond Wealth Management Group, LLC.

Item 6: Supervision

As a representative of Beyond Wealth Management Group, LLC, David W Cross is supervised by Christopher C Drouin, the firm's Chief Compliance Officer. Christopher C Drouin is responsible for ensuring that David W Cross adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Christopher C Drouin is (845) 750-6213.