

Christopher K. Barton

JEHM Wealth & Retirement, LLC

117 Woodruff Place Circle, Suite A

Simpsonville, SC 29681

(864) 527-0482

[Chris@jehmwealth.com](mailto:Chris@jehmwealth.com)

Firm Supplemental Brochure

ADV Part 2B

February 25, 2022

This Brochure Supplement provides information about Christopher K. Barton that supplements JEHM Wealth & Retirement, LLC’s brochure. You should have received a copy of that brochure. Please contact Mr. Barton at (864) 527-0482 if you did not receive JEHM Wealth & Retirement, LLC’s Brochure or if you have any questions about the contents of this supplement.

Additional information about Christophe K. Barton is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. The CRD number for Mr. Barton is 6372915.

# Item 2 – Educational Background and Business Experience

**Christopher K. Barton**

**Born:** 1969

**Education:**

***SUNY Delhi*** – Associate of Applied Science (“AAS”) in Architecture – 1991

***Sussex County Community College*** – AAS in Business Administration – 1996

***National Social Security Advisor (NSSA®)*** – 2018

*Issued By:* National Social Security Association

*Prerequisites:* A job function that includes advising clients about Social Security Benefits choices. Advisor status is determined by issuing organization.

*Education Requirements:* NSSA administered course (approximately 8 hours)

*Examination Type:* Certificate Exam (online, proctored)

*Continuing Education:* 8 hours every two years.

***Certified Fund Specialist (CFS) – December 2017***

*Issued By:* Institute of Business & Finance

*Prerequisites:* Bachelor’s degree or 2,000 hours of financial services work experience

*Education Requirements:* Six modules self-study program

*Examination Type:* Three exams (proctored, online) and a case study

*Continuing Education:* 30 hours of continuing education every two years

**Business Background**:

***JEHM Wealth & Retirement, LLC***

–Paraplanner – May 2018 to Present

–Investment Adviser Representative – August 2019 to Present

***Brookstone Capital Management*** – July 2018 to June 2019

– Investment Adviser Representative

***Self-Employed*** – April 2017 to Present

– Insurance Agent

***MML Investors Services*** – September 2017 to February 2018

–Registered Representative

***Mass Mutual*** – June 2017 to February 2018

–Agent

***Ward Services*** – September 2016 to February 2018

–Benefit Counselor

***Principal Securities, Inc./Principal Financial Group*** – July 2016 to July 2017

–Registered Representative

# Item 3 – Disciplinary Information

Registered investment adviser representatives are required to disclose all material facts regarding any legal or disciplinary events that could be material to your evaluation of each supervised person providing investment advice. Mr. Barton has no information that is applicable to this item.

# Item 4 – Other Business Activities

Mr. Barton is a licensed insurance agent of JEHM Wealth & Retirement, LLC. He is appointed with various insurance companies and may recommend insurance products to you. He devotes approximately 25% of his time to this activity. The sale of insurance products pays Mr. Barton commissions that are separate from the investment adviser fees outlined in Item 5 of the firm’s ADV Part 2A. This is a conflict of interest because it creates a financial incentive to recommend insurance products. However, Mr. Barton attempts to mitigate any conflicts of interest to the best of his ability by placing your interests ahead of his own and through the implementation of policies and procedures that address the conflict. Additionally, you are informed that you always have the right to choose whether to act on the recommendation and the right to purchase recommended insurance through any licensed insurance agent.

# Item 5 – Additional Compensation

Mr. Barton does not receive any additional compensation or economic benefits.

# Item 6 – Supervision

Mr. Barton is supervised by Eric Lahaie and Jennifer Lahaie, Managing Members of the firm. Mr. and Mrs. Lahaie review all new accounts opened by Mr. Barton. They can be reached at (864) 527-0482.

# Item 7 – Requirements for State-Registered Advisers

Arbitration or Civil, Self-Regulatory Organization or Administrative Proceedings

Mr. Barton has not been the subject of any arbitration, civil, self-regulatory organization or administrative findings.

Bankruptcy History

Mr. Barton has not been the subject of a bankruptcy petition.