



CHRISTOPHER K. BARTON

JEHM WEALTH & RETIREMENT, LLC
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FIRM SUPPLEMENTAL BROCHURE
ADV PART 2B
FEBRUARY 24, 2025

This Brochure Supplement provides information about Christopher K. Barton that supplements JEHM Wealth & Retirement, LLC's brochure. You should have received a copy of this 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. 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

Certified Fund Specialist (CFS) – December 2022

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

Certified Annuity Specialist (CAS®) – 2023

Issued By: Institute of Business & Finance

Prerequisites: Candidate must meet one of the following requirements, a bachelor’s degree or 2,000 hours of financial services work experience

Education Requirements: Candidate must complete Self Study Program (six modules)

Examination Type: Three exams and a case study

Continuing Education: 30 hours every two years

Certified Tax Specialist (CTS™) – 2024

Issued By: Institute of Business & Finance

Prerequisites: Candidate must meet one of the following requirements, a bachelor’s degree or 2,000 hours of financial services work experience

Education Requirements: Candidate must complete Self Study Program (six modules)

Examination Type: Closed book exams and a case study

Continuing Education: 30 hours every two years

Business Background:

JEHM Wealth & Retirement, LLC

– Paraplanner – May 2019 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

– Agent

-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 regarding this.

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.