



JEHM - ADV Part 2A
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ERIC R. LAHAIE

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FIRM SUPPLEMENTAL BROCHURE
ADV PART 2B
FEBRUARY 24, 2025

This Brochure Supplement provides information about Eric R. Lahaie that supplements JEHM Wealth & Retirement, LLC's brochure. You should have received a copy of that brochure. Please contact Mr. Lahaie 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 Eric R. Lahaie 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. Lahaie is 6021248.

Item 2 – Educational Background and Business Experience

Eric R. Lahaie

Born: 1970

Education:

Ferris State University – Applied Science in GM Automotive Technology – 1991 to 1993

Retirement Income Certified Professional (RICP®) – January 2016

Issued By: The American College

Prerequisites: Three years of professional experience

Education Requirements: Three required courses, equivalent of 9 semester credit hours

Examination Type: Final course exam for each course; closed-book, proctored

Continuing Education: 15 hours of continuing education 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

Certified Tax Specialist (CTS™) – ~~2025~~ February 2025

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

– Managing Member – September 2016 to Present

– Investment Adviser Representative – August 2019 to Present

Retirement Wealth Advisors – April 2017 to October 2019

– Investment Adviser Representative

JEHM, LLC dba JEHM Wealth & Retirement Strategies – December 2012 to Sept. 2016

- Managing Member
- Insurance Agent

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. Lahaie has no information that is applicable to this item.

Item 4 – Other Business Activities

Mr. Lahaie is owner and a licensed independent insurance agent of JEHM Wealth & Retirement, LLC. He is appointed with various insurance companies and may recommend insurance products to you. He devotes approximately 35% of his time to this activity. The sale of insurance products pays Mr. Lahaie 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. Lahaie 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. Lahaie does not receive any additional compensation or economic benefits.

Item 6 – Supervision

Mr. Lahaie is Managing Member of the firm. As a result, he has no internal supervision placed over him. He is, however, bound by the firm’s Code of Ethics and policies and procedures. Mr. Lahaie can be reached at (864) 527-0482.

Item 7 – Requirements for State-Registered Advisers

ARBITRATION OR CIVIL, SELF-REGULATORY ORGANIZATION OR ADMINISTRATIVE PROCEEDINGS

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

BANKRUPTCY HISTORY

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