

**Part 2B of Form ADV: *Brochure Supplement***

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**DBA: Corbett Road Wealth Management**

Spire Wealth Management, LLC  
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This brochure supplement provides information about Christopher Scott Airey, and his team at Corbett Road Wealth Management, that supplements the Spire Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Sue McKeown if you did not receive Spire Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Christopher Scott Airey is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

**Item 1**

The Corbett Road Wealth Management Services for high net worth individuals includes:

- Investment management
- Wealth/Retirement/Estate/Distribution Planning
- Wealth Transfer

Corbett Road has been providing customized Wealth Management solutions to unique clientele in Northern Virginia, Maryland and DC for over 20 years. We differentiate our company through a unique, proprietary approach to tactical asset management, comprehensive financial planning and a very high level of client service.

#### **Corbett Road Members:**

##### **C. Scott Airey, CFP®, AWMA®**

Scott has over twenty three years of professional experience and over seventeen years of investment management/consulting experience. Scott founded Corbett Road Wealth Management in 2002 (formerly known as VZN Group Wealth Management) with the belief that tactical asset management using a top-down macroeconomic approach is more effective than the modern portfolio theory and buy & hold approach used by many advisors in the wealth management industry. Scott is a member of the Corbett Road Investment Committee. Prior to founding the VZN Group Wealth Management, Scott spent a year as a Branch Manager at Charles Schwab & Co. in Alexandria, Virginia. Scott began his career in the financial services industry at Legg Mason Wood Walker in Baltimore City, Maryland and Alexandria, Virginia. Scott is a CFP® Practitioner, holds the FINRA Series 7,9,10, 63, 65 licenses and Life, Health and Variable Annuity Insurance licenses.

##### **Jeffrey McCoy AAMS®**

Jeff is the Director of Wealth Management for Corbett Road Wealth Management, and has over 21 years of experience in financial services. Prior to joining Corbett Road, Jeff spent the last 17 years at Charles Schwab & Co., as VP/Branch Manager overseeing several branch locations in Maryland and Virginia with branch assets of \$6.5 Billion. As a branch manager Jeff was responsible for branch P&L, compliance, sales revenue growth, oversight of investment recommendations and financial planning delivery for his teams. Jeff spent his early years in the industry with T. Rowe Price Associates and Legg Mason Wood Walker in Baltimore, Maryland. Jeff has a Bachelor's of Science in Consumer Economics from the University of Delaware and holds the FINRA Series 7, 9, 10, 63, 65 licenses and AAMS® designation.

##### **Matthew Gaffey, CFP®, ChFC®**

Matthew is a Senior Wealth Manager for Corbett Road Wealth Management. He offers clients more than nine years of financial services, retirement planning and investment management experience. His focus is centered on advising clients on the development and implementation of investment strategies to help clients in meeting their immediate and future goals. He follows a disciplined process of assessing a client's financial situation, determining risk tolerance and forming and executing an appropriate investment plan in order to obtain measurable results. He also consults on retirement planning, risk management and other critical financial strategies.

Prior to joining Corbett Road, Matthew worked for Fidelity Investments and was a President's Circle Award Winner. Matthew has earned the professional designations of Certified Financial Planner™ and Chartered Financial Consultant®. He is a native of Northern Virginia and received a Bachelor's of Science from Virginia Tech. He holds FINRA Series 7 and 66 licenses as well as Life, Health and Variable Annuity insurance licenses. Matthew is a member of the Financial Planning Association, Loudoun County Chamber of Commerce and Virginia Tech Alumni Association.

### **Rush Zarrabian, CFA**

Rush is a Portfolio Manager for Corbett Road Wealth Management. He heads the Asset Management Division and manages the Corbett Road strategies. Rush is also a member of the Corbett Road Investment Committee. Before joining Corbett Road, Rush worked at two of the largest financial institutions in the country in a variety of roles, including management, operations, and lending. Rush has a Bachelor's of Science in Finance from Virginia Tech and holds FINRA Series 7 and 66 licenses. He is a CFA Charterholder and a member of the CFA Institute and CFA Society of Washington, D.C.

### **Maureen Pitts, AAMS®**

Maureen is the Client Relationship Manager for Corbett Road Wealth Management. She oversees client relations and general administration for the team. Maureen previously worked as an account services supervisor at ADVISORport Inc., a financial services provider located in King of Prussia, Pennsylvania. She has over ten years experience working in the financial services industry providing excellent customer service to large enterprise sponsors, RIAs and money managers. Maureen earned a Bachelor's of Science in Business Administration from Cabrini College and holds FINRA Series 7, AAMS® designation and Maryland Life, Health and Variable Annuity Insurance licenses.

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

**Full Legal Name:** Christopher Scott Airey

**Born:** 1968

## **Education**

- Univ of Delaware; BS; 1991
- Univ. of Baltimore; MBA; 2002

## **Business Experience**

- Corbett Road President; from 8/28/2003 to present

## **Item 3 Disciplinary Information**

Scott had been found by FINRA in 2009 to have been involved in a private securities transaction, to which he failed to file an Outside Business Activity (OBA) in a timely manner which is a violation of FINRA rules. More information regarding this occurrence can be found on <http://brokercheck.finra.org>.

## **Item 4 Other Business Activities**

### **A. Investment-Related Activities**

Christopher Scott Airey, an Investment Advisor Representative of Spire Wealth Management is the owner and President of Corbett Road Investment Management, which provides separate account management services to Advisors and Institutions.

1. Christopher Scott Airey is also engaged in the following investment-related activities:

#### Registered representative of a broker-dealer

Advisor also carries the securities license required by FINRA (Financial Industry Regulatory Authority) in order to offer securities products and execute securities transactions in addition to their registration as an Investment Advisor representative providing investment advice. This additional licensing allows our advisors a much more robust suite of products to offer to their clients. Registration, supervision and continuing education are all requirements for maintaining this type of registration.

Conflicts of holding this type of license could be in cross-selling. Selling out of an advisory account and buying in a securities account and thereby generating a commission for the representative. Moving monies from an advisory account into a commission account in order to affect a commissionable trade.

Accounts and trades are reviewed for these types of activities.

The types of commissions that may be earned on these types of accounts/products could be any one of the following:

1. Mutual Fund 12b-1 commissions
2. Mutual Funds Trail Commissions
3. Direct Product Sponsor Commissions

#### Insurance company or agency

Licensed as an insurance representative allows the advisor to offer various insurance products such as Variable Annuities, Life Insurance, Long Term Care insurance. Typically these products generate commission payments to the representatives selling the products. The ability to offer these products to clients allows the advisor a much more robust suite of products and thereby providing the client with a much more comprehensive financial plan

2. Christopher Scott Airey receives commissions, bonuses or other compensation on the sale of securities or other investment products.

Holding these additional licenses and allowing the advisor the ability to offer securities products and insurance products in addition to their investment advice, may create a conflict of interest if the advisor is recommending these products in order to generate commissions rather than looking out for the best interests of the client. Each of these purchases is reviewed and approved by a principal of the firm. In addition, many of these products come with additional disclosures so that the client can fully understand the product.

3. Christopher Scott Airey is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

### **Item 5 Additional Compensation**

Christopher Scott Airey does not receive any economic benefit from a non-advisory client for the provision of advisory services.

### **Item 6 Supervision**

**Supervisor:** William Chao

**Title:** Vice President

**Phone Number:** 703-657-6063

In addition to an annual in person review of our firms policies and procedures, each advisor is subject to the following ongoing supervision and review:

Daily trade reviews

Monthly review of personal securities accounts

Monthly correspondence reviews - including ongoing capture and review of email

Periodic reviews of client account activity