



10800 Sikes Place, Suite 215  
Charlotte, NC 28277

## Form ADV Part 2

# Client Brochure Supplement

March 11, 2024

This Brochure Supplement provides information about certain Newton Wealth Management employees listed below that supplements the Archer Investment Corporation Brochure. Please contact Newton Wealth Management at (704) 552-8689 if you did not receive the Archer Investment Corporation Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Investment Advisor Representative Information**

Name: William Edward Newton, Jr

Address: 10800 Sikes Place, Suite 215, Charlotte, NC 28277

Phone: (704) 552-8689

## **Educational Background & Business Experience**

This section of the brochure supplement provides information on your Investment Advisor Representative's age, educational background and employment history.

**Year of Birth:** 1951

### **Educational Background**

The following information details your Investment Advisor Representative's formal education. If a degree was attained, the type of the degree will be listed next to the name of the institution. If a degree is not listed, the Investment Advisor Representative attended the institution but did not attain a degree.

Virginia Tech	Bachelor of Accounting
---------------	------------------------

Liberty University	Master of Arts
--------------------	----------------

### **Business Experience**

The following information details your Investment Advisor Representative's business experience for at least the past 5 years.

ARCHER INVESTMENT CORPORATION  
INVESTMENT ADVISOR REPRESENTATIVE

**From:** 10/2011 **To:** PRESENT

W. EDWARD NEWTON JR., CPA  
OWNER

**From:** 1977 **To:** PRESENT

NEWTON WEALTH MANAGEMENT, LLC  
OWNER

**From:** 1992 **To:** PRESENT

## **Professional Designations**

The following provides information on professional designation(s) that your Investment Advisor Representative earned. Additional information about various professional designations is available at <http://apps.finra.org/DataDirectory/1/prodesignations.aspx>.

### **Certified Public Accountant (CPA)**

Certified Public Accountant (CPA) 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.

### **Certified Financial Planner (CFP)**

The Certified Financial Planner (CFP) designation is a professional certification mark for financial planners conferred by the Certified Financial Planner Board of Standards (CFP Board) in the United States, and by 25 other organizations affiliated with Financial Planning Standards Board (FPSB), the international owner of the CFP mark outside of the United States.

To receive authorization to use the designation, the candidate must meet education, examination, experience and ethics requirements, and pay an ongoing certification fee. The information relates specifically to CFP certification in the United States.

## **Disciplinary Information**

This section of the brochure supplement details any legal or disciplinary event(s) that may be material to your evaluation of your Investment Advisor Representative.

There are no legal or disciplinary event(s) to disclose.

Additional information about your Investment Advisor Representative is available at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Other Business Activities**

Your Investment Advisor Representative may have a financial incentive to recommend Archer Model Portfolios over other programs or services based on various compensation factors. Archer Investment Corporation intends, however, to make all recommendations independent of any compensation considerations and based solely on our obligations to consider your objectives and needs. The Firm has a supervisory structure in place to review for potential conflicts of interest.

In addition, Investment Advisor Representatives may derive substantial income and spend considerable time providing non-investment related services to their Clients such legal, tax accounting, payroll or other products or services that are not affiliated with Archer Investment Corporation or its affiliates. The responsibilities of Archer Investment Corporation and its affiliates relate specifically to offering approved securities and investment advisory services, and do not apply to any other products or services obtained from the Investment Advisor Representative that are not offered through Archer Investment Corporation or its affiliates.

If your Advisory Consultant is engaged in other investment related or non-investment related activities, they will be listed below. The following details any Other Business Activities of your Investment Advisor Representative that are not referenced above in Business Experience.

None

### **Additional Compensation**

Archer compensates the Investment Advisor Representatives for recommending clients to Archer. The IARs are paid a percentage of the management fee paid to Archer and therefore may have a financial incentive to recommend Archer Models and investment.

Archer may continue to pay a retired IAR or his/her estate who may receive compensation for an agreed-upon time frame based on death or retirement or other unforeseen circumstance.

### **Supervision**

The Firm maintains a supervisory structure designed to detect and prevent violations of securities laws, rules and regulations. The Firm requires all supervisory personnel to meet appropriate qualification criteria and to exercise diligence while supervising Firm activities. Qualified supervisory personnel use various systems and other supervisory tools to monitor transactional and account activity to ensure adherence with Firm policies and procedures. In addition, the supervisory structure and its personnel are regularly evaluated for their effectiveness, compliance and adherence to the Firm's standards.

Below is the name and contact information for your Investment Advisor Representative's Supervisor.

Supervisor: Troy C. Patton, CPA/ABV

Title: President

Phone: 317-581-5664

## **Investment Advisor Representative Information**

Name: Elizabeth Mellis Newton

Address: 10800 Sikes Place, Suite 215, Charlotte, NC 28277

Phone: (704) 552-8689

## **Educational Background & Business Experience**

This section of the brochure supplement provides information on your Investment Advisor Representative's age, educational background and employment history.

**Year of Birth:** 1988

### **Educational Background**

The following information details your Investment Advisor Representative's formal education. If a degree was attained, the type of the degree will be listed next to the name of the institution. If a degree is not listed, the Investment Advisor Representative attended the institution but did not attain a degree.

Oklahoma City University

Bachelor of Science

### **Business Experience**

The following information details your Investment Advisor Representative's business experience for at least the past 5 years.

ARCHER INVESTMENT CORPORATION  
INVESTMENT ADVISOR REPRESENTATIVE

**From:** 12/2023 **To:** PRESENT

NEWTON WEALTH MANAGEMENT  
VP OF CLIENT ENGAGEMENT

**From:** 03/2021 **To:** PRESENT

WRAY WARD  
SENIOR PROJECT MANAGER

**From:** 12/2020 **To:** 03/2021

CORY'S AUDIO VISUAL  
SENIOR ACCOUNT MANAGER

**From:** 09/2015 **To:** 09/2020

## **Professional Designations**

The following provides information on professional designation(s) that your Investment Advisor Representative earned. Additional information about various professional designations is available at <http://apps.finra.org/DataDirectory/1/prodesignations.aspx>.

## **Disciplinary Information**

This section of the brochure supplement details any legal or disciplinary event(s) that may be material to your evaluation of your Investment Advisor Representative.

There are no legal or disciplinary event(s) to disclose.

Additional information about your Investment Advisor Representative is available at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Other Business Activities**

Your Investment Advisor Representative has a financial incentive to recommend Archer Model Portfolios over other programs or services based on various compensation factors. Archer Investment Corporation intends, however, to make all recommendations independent of any compensation considerations and based solely on our obligations to consider your objectives and needs. The Firm has a supervisory structure in place to review for potential conflicts of interest.

In addition, Investment Advisor Representatives may derive substantial income and spend considerable time providing non-investment related services to their Clients such legal, tax accounting, payroll or other products or services that are not affiliated with Archer Investment Corporation or its affiliates. The responsibilities of Archer Investment Corporation and its affiliates relate specifically to offering approved securities and investment advisory services, and do not apply to any other products or services obtained from the Investment Advisor Representative that are not offered through Archer Investment Corporation or its affiliates.

If your Advisory Consultant is engaged in other investment related or non-investment related activities, they will be listed below. The following details any Other Business Activities of your Investment Advisor Representative that are not referenced above in Business Experience.

None

## **Additional Compensation**

Archer compensates the Investment Advisor Representatives for recommending clients to Archer. The IARs are paid a percentage of the management fee paid to Archer and therefore have a financial incentive to recommend Archer Models and investments.

Archer may continue to pay a retired IAR or his/her estate who may receive compensation for an agreed-upon time frame based on death or retirement or other unforeseen circumstance.

## **Supervision**

The Firm maintains a supervisory structure designed to detect and prevent violations of securities laws, rules and regulations. The Firm requires all supervisory personnel to meet appropriate qualification criteria and to exercise diligence while supervising Firm activities. Qualified supervisory personnel use

various systems and other supervisory tools to monitor transactional and account activity to ensure adherence with Firm policies and procedures. In addition, the supervisory structure and its personnel are regularly evaluated for their effectiveness, compliance and adherence to the Firm's standards.

Below is the name and contact information for your Investment Advisor Representative's Supervisor.

Supervisor: Troy C. Patton, CPA/ABV

Title: President

Phone: 317-581-5664