

This brochure supplement provides information about William Robert McGoldrick that supplements the Wealth & Pension Services Group, Inc. brochure. You should have received a copy of that brochure. Please contact William Robert McGoldrick, President if you did not receive Wealth & Pension Services Group, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about William Robert McGoldrick is also available on the SEC's website at www.adviserinfo.sec.gov.

Wealth & Pension Services Group, Inc.
Form ADV Part 2B – Individual Disclosure Brochure

for

William Robert McGoldrick, Sr.

Personal CRD Number: 2444007
Investment Adviser Representative

Wealth & Pension Services Group, Inc.
2866 Johnson Ferry Road, Suite 100
Marietta, Georgia 30062
(770) 992-7614
Robert.McGoldrick@taiadvisor.com

UPDATED: 8/16/2018

Item 2: Educational Background and Business Experience

Name: William Robert McGoldrick

Born: 1952

Educational Background and Professional Designations:

Education:

BBA Accounting, Georgia Southern University- 1974

Designations:

CFP® - Certified Financial Planner

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- ii. Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business Background:

04/2015 – Present	Investment Adviser Representative Wealth & Pension Services Group, Inc.
07/1998 – Present	Investment Adviser Representative Vining Financial
07/1998 – Present	Registered Representative Triad Advisors, LLC
02/1991 – Present	Doer Of All Things McGoldrick & Company, CPA, CFP

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

William Robert McGoldrick is an investment adviser representative with Vining Financial, a registered representative with Triad Advisors, LLC, and an accountant with and the owner of McGoldrick & Company, CPA, CFP. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission or other compensation and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. Wealth & Pension Services Group, Inc. always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services of any representative of Wealth & Pension Services Group, Inc. in such individual's outside capacities.

Item 5: Additional Compensation

William Robert McGoldrick does not receive any economic benefit from any person, company, or organization, other than Wealth & Pension Services Group, Inc. in exchange for providing clients advisory services through Wealth & Pension Services Group, Inc. .

Item 6: Supervision

As a representative of Wealth & Pension Services Group, Inc., William Robert McGoldrick works closely with supervisor Willing Kring, chief compliance officer. William Kring can be reached at (770) 333-0113.

Advice provided to clients is reviewed by this supervisor as part of the firm's policies and procedures and monitored through account reviews and various compliance reviews.

William Robert McGoldrick adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.