

Item 1 Cover Page

A.

Marc L. Scudillo

EisnerAmper Wealth Management
& Corporate Benefits, LLC

ADV Part 2B, Brochure Supplement
Dated: May 5, 2020

Contact: Marc L. Scudillo, Chief Compliance Officer
111 Wood Avenue South, Suite 110
Iselin, New Jersey 08830

B.

This Brochure Supplement provides information about Marc L. Scudillo that supplements the EisnerAmper Wealth Management & Corporate Benefits, LLC Brochure; you should have received a copy of that Brochure. Please contact Marc L. Scudillo, Chief Compliance Officer, if you did *not* receive EisnerAmper Wealth Management & Corporate Benefits, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Marc L. Scudillo is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Education Background and Business Experience

Marc L. Scudillo was born in 1972. Mr. Scudillo graduated from Colgate University, with a Bachelor of Arts degree in Economics and German. Mr. Scudillo graduated from New York University, Stern School of Business with a Master of Business Administration degree in Finance and a Master of Science degree in Accounting. Mr. Scudillo has been the Managing Officer and an investment adviser representative of EisnerAmper Wealth Management and Corporate Benefits, LLC since September of 2001. Mr. Scudillo has also been a registered representative of APW Capital, Inc. (formerly known as Comprehensive Asset Management & Servicing, Inc.) since April of 2010.

Mr. Scudillo has held the designation of Certified Public Accountant (“CPA”) since 1996. 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* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA’s *Code of Professional Conduct* within their state accountancy laws or have created their own.

Mr. Scudillo has been a CERTIFIED FINANCIAL PLANNER™ since 1998. Certified Financial Planner Board of Standards, Inc. (“CFP Board”) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with flame design) logo in the United States (these marks are collectively referred to as the “CFP® marks”). The CFP Board authorizes use of the CFP® marks by individuals who successfully complete the CFP Board’s initial and ongoing certification requirements.

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 86,000 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 a 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 or an accepted equivalent, including [completion of a financial plan development capstone course](#), and attain a Bachelor’s Degree from an accredited college or university. CFP Board’s financial planning subject areas include professional conduct and regulation, general principles of financial planning, education planning, risk management and insurance planning, investment planning, income tax planning, retirement savings and income planning, and estate planning;

- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 6 hours, 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 – CFP Board requires 6,000 hours of experience through the Standard Pathway, or 4,000 hours of experience through the Apprenticeship Pathway that meets additional requirements ; and
- Ethics – Agree to be bound by CFP Board’s *Code of Ethics and Standards of Conduct*, which put clients’ interest first; acknowledge CFP Board’s right to enforce them through its *Disciplinary Rules and Procedures*; comply with the *Financial Planning Practice Standards* which determine what clients should reasonably expect from the financial planning engagement and complete a CFP® Certification Application which requires disclosure of an individual’s background, including involvement in any criminal, civil, governmental, or self-regulatory agency proceeding or inquiry, bankruptcy, customer complaint, filing, termination/internal reviews conducted by the individual’s employer or firm.

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:

- Continuing Education – Complete 30 hours of continuing education hours accepted by the CFP Board 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
- Ethics – CFP® professionals agree to adhere to the high standards of ethics and practice outlined in CFP Board’s Code of Ethics and Standards of Conduct and to acknowledge CFP Board’s right to enforce them through its Disciplinary Rules and Procedures. The Code of Ethics and Standards of Conduct require that CFP Professionals provide financial planning services in the best interests of their clients.
- Certification Application – Properly complete a Certification Application to (i) acknowledge voluntary adherence to the [terms and conditions of certification with CFP Board](#) and (ii) disclose any involvement in criminal and civil proceedings, inquiries or investigations, bankruptcy filings, internal reviews and customer complaints.

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.

You may [verify an individual's CFP®](#) certification and background through the CFP Board. The verification function will allow you to verify an individual’s certification status, CFP Board’s disciplinary history and any bankruptcy disclosures in the past ten years. Additional regulatory information may also be found through [FINRA’S BrokerCheck](#) and the [SEC’s Investment Adviser Public Disclosure databases](#), which are free tools that may be used to conduct research

on the background and experience of CFP® professionals and those who held CFP® certification at one time, including with respect to employment history, regulatory actions, and investment-related licensing information, arbitrations, and complaints.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

A. **Registered Representative of Aurora Private Wealth.** Mr. Scudillo is a registered representative of Aurora Private Wealth (“*APW Capital, Inc.*”), an SEC Registered and FINRA member broker-dealer. Clients may choose to engage Mr. Scudillo in his individual capacity as a registered representative of *APW Capital, Inc.*, to implement investment recommendations on a commission basis.

1. **Conflict of Interest** The recommendation by Mr. Scudillo that a client purchase a securities commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions to be received, rather than on a particular client’s need. No client is under any obligation to purchase any commission products from Mr. Scudillo. Clients are reminded that they may purchase investment products recommended by Mr. Scudillo through other, non-affiliated broker dealers. **The Registrant’s Chief Compliance Officer, Marc L. Scudillo, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**
2. **Commissions** In the event the client chooses to purchase investment products through *APW Capital, Inc.*, brokerage commissions will be charged by *APW Capital, Inc.* to effect securities transactions, a portion of which commissions shall be paid by *APW Capital, Inc.* to Mr. Scudillo. The brokerage commissions charged by *APW Capital, Inc.* may be higher or lower than those charged by other broker-dealers. The securities commission business conducted by Mr. Scudillo is separate and apart from Registrant’s investment management services discussed in the Registrant’s *Brochure*.

Licensed Insurance Agent. Mr. Scudillo, in his individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Mr. Scudillo to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Mr. Scudillo that a client purchase an insurance commission product presents a *conflict of interest*, as the receipt of commissions may provide an incentive to recommend insurance products based on commissions to be received, rather than on a particular client’s need. No client is under any

obligation to purchase any insurance commission products from Mr. Scudillo. Clients are reminded that they may purchase insurance products recommended by Mr. Scudillo through other, non-affiliated insurance agents. **The Registrant's Chief Compliance Officer, Marc L. Scudillo, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**

Certified Public Accountant. Although Mr. Scudillo is a Certified Public Accountant, he does not render accounting advice or tax preparation services to the Registrant's clients. Rather, to the extent that a client requires accounting advice and/or tax preparation services, Mr. Scudillo, if requested, may recommend the services of another Certified Public Accountant, all of which services shall be rendered independent of the Registrant pursuant to a separate agreement between the client and the Certified Public Accountant. Registrant shall not receive any of the fees charged by any recommended Certified Public Accountant, referral or otherwise. EisnerAmper LLP ("EA"), a Certified Public Accounting firm with whom the Registrant shares office space and administrative personnel, is the fifty percent (50%) owner of the Registrant. EA provides accounting and/or tax preparation services, including to clients of the Registrant. To the extent that EA provides accounting and/or tax preparation services to any clients, including clients of the Registrant, all such services shall be performed by EA, independent of the Registrant, for which services Registrant shall not receive any portion of the fees charged by EA, referral or otherwise. It is expected that members of EA, solely incidental to their respective practices as Certified Public Accountants, shall recommend the Registrant's services to certain of EA's clients. Neither EA, nor any of its members, shall receive referral fees from the Registrant. However, members of EA shall be entitled to receive distributions relative to their respective ownership interests in Registrant. Neither EA, nor any of its members, are currently involved in providing investment advice on behalf of the Registrant, nor does EA, hold itself out as providing advisory services on its own behalf or on behalf of the Registrant.

Item 5 Additional Compensation

None.

Item 6 Supervision

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "*Act*"). The Registrant's Chief Compliance Officer, Marc L. Scudillo, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Scudillo at (908) 429-0025.

Item 1 Cover Page

A.

Steven S. Wang

EisnerAmper Wealth Management
& Corporate Benefits, LLC

ADV Part 2B, Brochure Supplement
Dated: May 5, 2020

Contact: Marc L. Scudillo, Chief Compliance Officer
111 Wood Avenue South, Suite 110
Iselin, New Jersey 08830

B.

This Brochure Supplement provides information about Steven S. Wang that supplements the EisnerAmper Wealth Management & Corporate Benefits, LLC Brochure; you should have received a copy of that Brochure. Please contact Marc L. Scudillo, Chief Compliance Officer, if you did *not* receive EisnerAmper Wealth Management & Corporate Benefits, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Steven S. Wang is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Education Background and Business Experience

Steven S. Wang was born in 1970. Mr. Wang graduated from Tamkang University, with a Bachelor of Business Administration and from Pace University with a Master of Science degree. Mr. Wang has been employed as a registered investment adviser and Assistant Insurance Agent of EisnerAmper Wealth Management and Corporate Benefits, LLC since May of 2003. Mr. Wang has also been a registered representative of APW Capital, Inc. (formerly known as Comprehensive Asset Management & Servicing, Inc.) since April of 2010.

Mr. Wang has been a CFA[®] Charter Holder since 2003. CFA[®] designates an international professional certificate that is offered by the CFA Institute.

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute — the largest global association of investment professionals.

There are currently more than 167,000 CFA charter holders working in 170 countries. To earn the CFA charter, candidates must: (1) pass three sequential, six-hour examinations; (2) have at least four years of qualified professional investment experience; (3) join CFA Institute as members; and (4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charter holders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

Global Recognition

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders—often making the charter a prerequisite for employment. Additionally, regulatory bodies in 38 countries/territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 466 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

Comprehensive and Current Knowledge

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

- A. **Registered Representative of Aurora Private Wealth.** Mr. Wang is a registered representative of Aurora Private Wealth (“*APW Capital, Inc.*”), an SEC Registered and FINRA member broker-dealer. Clients may choose to engage Mr. Wang in his individual capacity as a registered representative of *APW Capital, Inc.*, to implement investment recommendations on a commission basis.
1. **Conflict of Interest** The recommendation by Mr. Wang that a client purchase a securities commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions to be received, rather than on a particular client’s need. No client is under any obligation to purchase any commission products from Mr. Wang. Clients are reminded that they may purchase investment products recommended by Mr. Wang through other, non-affiliated broker dealers. **The Registrant’s Chief Compliance Officer, Marc L. Scudillo, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**
 2. **Commissions** In the event the client chooses to purchase investment products through *APW Capital, Inc.*, brokerage commissions will be charged by *APW Capital, Inc.* to effect securities transactions, a portion of which commissions shall be paid by *APW Capital, Inc.* to Mr. Wang. The brokerage commissions charged by *APW Capital, Inc.* may be higher or lower than those charged by other broker-dealers. The securities commission business conducted by Mr. Wang is separate and apart from Registrant’s investment management services discussed in the Registrant’s *Brochure*.
- B. The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

Item 5 Additional Compensation

None.

Item 6 Supervision

The Registrant provides investment advisory and supervisory services in accordance with the Registrant’s policies and procedures manual. The primary purpose of the Registrant’s Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the “*Act*”). The Registrant’s Chief Compliance Officer, Marc L. Scudillo, is primarily responsible for the implementation of the Registrant’s policies and procedures and overseeing the activities of the Registrant’s supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the

Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Scudillo at (908) 429-0025.

Item 1 Cover Page

A.

Lawrence Seigelstein

EisnerAmper Wealth Management
& Corporate Benefits, LLC

Brochure Supplement
Dated: May 5, 2020

Contact: Marc L. Scudillo, Chief Compliance Officer
111 Wood Avenue South, Suite 110
Iselin, New Jersey 08830

B.

This Brochure Supplement provides information about Lawrence Seigelstein that supplements the EisnerAmper Wealth Management & Corporate Benefits, LLC Brochure; you should have received a copy of that Brochure. Please contact Marc L. Scudillo, Chief Compliance Officer, if you did *not* receive EisnerAmper Wealth Management & Corporate Benefits, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Lawrence Seigelstein is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Education Background and Business Experience

Lawrence Seigelstein was born in 1965. Mr. Seigelstein graduated from the State University of New York at Albany with a Bachelor of Arts degree in Economics. Since September 2008, Mr. Seigelstein has been an investment adviser representative of EisnerAmper Wealth Management & Corporate Benefits, LLC and since May 2016, he has been an investment adviser representative. Mr. Seigelstein has also been a registered representative of APW Capital, Inc. (formerly known as Comprehensive Asset Management & Servicing, Inc.) since August 2010.

Mr. Seigelstein has held the designation of Accredited Investment Fiduciary® (AIF®) since June 1, 2011. The AIF Designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF Designation, the individual must meet prerequisite criteria based on a combination of education, relevant industry experience, and/or ongoing professional development, complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the Code of Ethics and Conduct Standards. In order to maintain the AIF Designation, the individual must annually attest to the Code of Ethics and Conduct Standards, and accrue and report a minimum of six hours of continuing education. The Designation is administered by the Center for Fiduciary Studies, the standards-setting body of fi360.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

- A. **Registered Representative of Aurora Private Wealth.** Mr. Seigelstein is a registered representative of Aurora Private Wealth (“*APW Capital, Inc.*”), an SEC Registered and FINRA member broker-dealer. Clients may choose to engage Mr. Seigelstein in his individual capacity as a registered representative of *APW Capital, Inc.*, to implement investment recommendations on a commission basis.
1. **Conflict of Interest** The recommendation by Mr. Seigelstein that a client purchase a securities commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions to be received, rather than on a particular client’s need. No client is under any obligation to purchase any commission products from Mr. Seigelstein. Clients are reminded that they may purchase investment products recommended by Mr. Seigelstein through other, non-affiliated broker dealers. **The Registrant’s Chief Compliance Officer, Marc L. Scudillo, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**
 2. **Commissions** In the event the client chooses to purchase investment products through *APW Capital, Inc.*, brokerage commissions will be charged by *APW Capital, Inc.* to effect securities transactions, a portion of which commissions shall be paid by *APW Capital, Inc.* to Mr. Seigelstein. The brokerage commissions charged by *APW Capital, Inc.* may be higher or lower than those charged by other broker-dealers. The securities commission business conducted by Mr. Seigelstein is separate and apart from Registrant’s investment management services discussed in the Registrant’s *Brochure*.

- B. **Licensed Insurance Agent.** Mr. Seigelstein, in his individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Mr. Seigelstein to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Mr. Seigelstein that a client purchase an insurance commission product presents a *conflict of interest*, as the receipt of commissions may provide an incentive to recommend insurance products based on commissions to be received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Seigelstein. Clients are reminded that they may purchase insurance products recommended by Mr. Seigelstein through other, non-affiliated insurance agents. **The Registrant's Chief Compliance Officer, Marc L. Scudillo, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**

Item 5 Additional Compensation

None.

Item 6 Supervision

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Item 1 Cover Page

A.

Christopher Michael Gibbons

EisnerAmper Wealth Management
& Corporate Benefits, LLC

ADV Part 2B, Brochure Supplement
Dated: May 5, 2020

Contact: Marc L. Scudillo, Chief Compliance Officer
111 Wood Avenue South, Suite 110
Iselin, New Jersey 08830

B.

This Brochure Supplement provides information about Christopher M. Gibbons that supplements the EisnerAmper Wealth Management & Corporate Benefits, LLC Brochure; you should have received a copy of that Brochure. Please contact Marc L. Scudillo, Chief Compliance Officer, if you did *not* receive EisnerAmper Wealth Management & Corporate Benefits, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Christopher M. Gibbons is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Education Background and Business Experience

Christopher M. Gibbons was born in 1982. Mr. Gibbons graduated from Pennsylvania State University with a Bachelor of Philosophy degree and received a Masters of Liberal Arts degree from the University of Pennsylvania. Mr. Gibbons has been a Wealth Manager with EisnerAmper Wealth Management and Corporate Benefits, LLC since September 2018. Mr. Gibbons has also been a registered representative of APW Capital, Inc. (formerly known as Comprehensive Asset Management & Servicing, Inc.) since October 2018. From October 2017 through September 2018, Mr. Gibbons was a Senior Financial Advisor with Wisdom Planning, LLC and Cordasco Financial Network, LLC as well as a registered representative of Andrew Garrett. From June 2007 through September 2017, Mr. Gibbons was a registered representative of Thrivent Investment Management Inc. and a Financial Representative with Thrivent Financial for Lutherans.

Mr. Gibbons has been a CERTIFIED FINANCIAL PLANNER™ since 2013. Certified Financial Planner Board of Standards, Inc. (“CFP Board”) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with flame design) logo in the United States (these marks are collectively referred to as the “CFP® marks”). The CFP Board authorizes use of the CFP® marks by individuals who successfully complete the CFP Board’s initial and ongoing certification requirements.

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 86,000 individuals have obtained CFP® certification in the United States.

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- Experience – CFP Board requires 6,000 hours of experience through the Standard Pathway, or 4,000 hours of experience through the Apprenticeship Pathway that meets additional requirements ; and
- Ethics – Agree to be bound by CFP Board’s *Code of Ethics and Standards of Conduct*, which put clients’ interest first; acknowledge CFP Board’s right to enforce them through its *Disciplinary Rules and Procedures*; comply with the *Financial Planning Practice Standards* which determine what clients should reasonably expect from the financial planning engagement and complete a CFP® Certification Application which requires disclosure of an individual’s background, including involvement in any criminal, civil, governmental, or self-regulatory agency proceeding or inquiry, bankruptcy, customer complaint, filing, termination/internal reviews conducted by the individual’s employer or firm.

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Mr. Gibbons has held the designation of FIC (Fraternal Insurance Counselor) since 2008. The FIC requires, as a prerequisite twelve consecutive months of work experience and good standing with a fraternal benefit society which is a member of the National Fraternal Congress of America and the Fraternal Field Managers’ Association, or the Canadian Fraternal Congress. The candidate must complete four courses and pass a final written examination.

Mr. Gibbons has held the designation of Chartered Life Underwriter (CLU®) since 2015. Since 1927, the CLU® has been the respected risk management credential for advisors. Designees have completed eight or more college-level courses representing an average study time of 400 hours. Topics for required courses include insurance and financial planning, life insurance law, estate planning, and planning for business owners and professionals. Elective courses include such advanced topics as income taxes, group benefits, retirement planning, and health insurance. CLU® designees must meet experience and continuing education requirements and must adhere to a high ethical standard. The mark is awarded by The American College, a non-profit educator with the top level of academic accreditation.

Mr. Gibbons has held the designation of CAP[®] (Chartered Advisor in Philanthropy[®]) since 2017. The advisor earning the CAP[®] designation has taken three graduate school courses in philanthropy including planning for impact in the context of family wealth, charitable strategies, and gift planning in a nonprofit context. The courses are offered through the Irwin Graduate School of The American College, a non-profit educator with an 84-year heritage and the highest level of academic accreditation. CAP[®] advisors must meet experience, ethics, and continuing education requirements to use the credential.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

- A. **Registered Representative of Aurora Private Wealth.** Mr. Gibbons is a registered representative of Aurora Private Wealth (“*APW Capital, Inc.*”), an SEC Registered and FINRA member broker-dealer. Clients may choose to engage Mr. Gibbons in his individual capacity as a registered representative of *APW Capital, Inc.*, to implement investment recommendations on a commission basis.
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- B. **Licensed Insurance Agent.** Mr. Gibbons, in his individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Mr. Gibbons to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Mr. Gibbons that a client purchase an insurance commission product presents a *conflict of interest*, as the

receipt of commissions may provide an incentive to recommend insurance products based on commissions to be received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Gibbons. Clients are reminded that they may purchase insurance products recommended by Mr. Gibbons through other, non-affiliated insurance agents. **The Registrant's Chief Compliance Officer, Marc L. Scudillo, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**

Item 5 Additional Compensation

None.

Item 6 Supervision

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "*Act*"). The Registrant's Chief Compliance Officer, Marc L. Scudillo, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Scudillo at (908) 429-0025.

Item 1 Cover Page

A.

David Gottlieb

EisnerAmper Wealth Management
& Corporate Benefits, LLC

ADV Part 2B, Brochure Supplement
Dated: May 5, 2020

Contact: Marc L. Scudillo, Chief Compliance Officer
111 Wood Avenue South, Suite 110
Iselin, New Jersey 08830

B.

This Brochure Supplement provides information about David Gottlieb that supplements the EisnerAmper Wealth Management & Corporate Benefits, LLC Brochure; you should have received a copy of that Brochure. Please contact Marc L. Scudillo, Chief Compliance Officer, if you did *not* receive EisnerAmper Wealth Management & Corporate Benefits, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about David Gottlieb is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Education Background and Business Experience

David Gottlieb was born in 1981. Mr. Gottlieb graduated from Syracuse University, with a Bachelor's degree in Accounting and with a Master's degree in Accounting. Mr. Gottlieb has been employed as a Wealth Advisor of EisnerAmper Wealth Management and Corporate Benefits, LLC since May 2019. Mr. Gottlieb has also been a registered representative of APW Capital, Inc. (formerly known as Comprehensive Asset Management & Servicing, Inc.) since June 2019. From July 2015 through May 2019, Mr. Gottlieb was a registered representative of Ameriprise Financial Services, Inc. From February 2015 until July 2015, Mr. Gottlieb was a Financial Advisor with Morgan Stanley Private Bank, National Association. From March 2010 through February 2012, Mr. Gottlieb was a registered representative with Empire Asset Management Co.

Mr. Gottlieb has held the designation of Chartered Retirement Plans SpecialistSM (CRPS) since 2015. The College of Financial Planning® awards the CRPS designation to applicants who complete the CRPS professional education program, pass a final examination, commit to a code of ethics and agree to pursue continuing education. Continued use of the CRPS designation is subject to ongoing renewal requirements. Every two (2) years the designee must renew their right to continue using the CRPSSM designation by completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct.

Mr. Gottlieb has held the designation of Accredited Portfolio Management AdvisorSM (APMASM) since 2017. Individuals who hold the APMASM designation have completed a course of study encompassing client assessment and suitability, risk/return, investment objectives, bond and equity portfolios, modern portfolio theory and investor psychology. Students have hands-on practice in analyzing investment policy statements, building portfolios, and making asset allocation decisions including sell, hold, and buy decisions within a client's portfolio. The program consists of two parts designed for a total of approximately 120-150 hours of study. The first part includes an 11 module self-study course with an online, proctored exam. Students successfully completing the exam matriculate to the second part of the program. That part consists of a four week, instructor-led, online graduate course requiring successful completion of several graded assignments involving investor policy statements, portfolio construction, asset allocation, and portfolio buy, sell, and hold decisions. The program must be completed within one year from enrollment.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

A. **Registered Representative of Aurora Private Wealth.** Mr. Gottlieb is a registered representative of Aurora Private Wealth (“APW Capital, Inc.”), an SEC Registered and FINRA member broker-dealer. Clients may choose to engage Mr. Gottlieb in his individual capacity as a registered representative of APW Capital, Inc., to implement investment recommendations on a commission basis.

1. **Conflict of Interest** The recommendation by Mr. Gottlieb that a client purchase a securities commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions to be received, rather than on a particular client's need. No client is under any obligation to purchase any commission products from Mr. Gottlieb. Clients are reminded that they may purchase investment products recommended by Mr. Gottlieb through other, non-affiliated broker dealers. **The Registrant's Chief Compliance Officer, Marc L. Scudillo, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**

2. **Commissions** In the event the client chooses to purchase investment products through *APW Capital, Inc.*, brokerage commissions will be charged by *APW Capital, Inc.* to effect securities transactions, a portion of which commissions shall be paid by *APW Capital, Inc.* to Mr. Gottlieb. The brokerage commissions charged by *APW Capital, Inc.* may be higher or lower than those charged by other broker-dealers. The securities commission business conducted by Mr. Gottlieb is separate and apart from Registrant's investment management services discussed in the Registrant's *Brochure*.
- B. **Licensed Insurance Agent.** Mr. Gottlieb, in his individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Mr. Gottlieb to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Mr. Gottlieb that a client purchase an insurance commission product presents a *conflict of interest*, as the receipt of commissions may provide an incentive to recommend insurance products based on commissions to be received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Gottlieb. Clients are reminded that they may purchase insurance products recommended by Mr. Gottlieb through other, non-affiliated insurance agents. **The Registrant's Chief Compliance Officer, Marc L. Scudillo, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**

Item 5 Additional Compensation

None.

Item 6 Supervision

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "*Act*"). The Registrant's Chief Compliance Officer, Marc L. Scudillo, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Scudillo at (908) 429-0025.

Item 1 Cover Page

A.

Jennifer Lyn Keiling

EisnerAmper Wealth Management
& Corporate Benefits, LLC

ADV Part 2B, Brochure Supplement
Dated: May 5, 2020

Contact: Marc L. Scudillo, Chief Compliance Officer
111 Wood Avenue South, Suite 110
Iselin, New Jersey 08830

B.

This Brochure Supplement provides information about Jennifer Lyn Keiling that supplements the EisnerAmper Wealth Management & Corporate Benefits, LLC Brochure; you should have received a copy of that Brochure. Please contact Marc L. Scudillo, Chief Compliance Officer, if you did *not* receive EisnerAmper Wealth Management & Corporate Benefits, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jennifer Lyn Keiling is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Education Background and Business Experience

Jennifer Lyn Keiling was born in 1975. Ms. Keiling graduated from The City University of New York, with a Bachelor of Arts degree in Psychology. Ms. Keiling has been employed as a Relationship Manager of EisnerAmper Wealth Management and Corporate Benefits, LLC since June 2019. Ms. Keiling has also been a registered representative of APW Capital, Inc. (formerly known as Comprehensive Asset Management & Servicing, Inc.) since June 2019. From October 2018 through June 2019, Ms. Keiling was a registered representative of Financial Engines Advisors L.L.C. From January 2012 through November 2018, Ms. Keiling was a Client Service Associate with Edelman Financial Services.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

- A. **Registered Representative of Aurora Private Wealth.** Ms. Keiling is a registered representative of Aurora Private Wealth (“APW Capital, Inc.”), an SEC Registered and FINRA member broker-dealer. Clients may choose to engage Ms. Keiling in her individual capacity as a registered representative of APW Capital, Inc., to implement investment recommendations on a commission basis.
1. **Conflict of Interest** The recommendation by Ms. Keiling that a client purchase a securities commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions to be received, rather than on a particular client’s need. No client is under any obligation to purchase any commission products from Ms. Keiling. Clients are reminded that they may purchase investment products recommended by Ms. Keiling through other, non-affiliated broker dealers. **The Registrant’s Chief Compliance Officer, Marc L. Scudillo, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**
 2. **Commissions** In the event the client chooses to purchase investment products through APW Capital, Inc., brokerage commissions will be charged by APW Capital, Inc. to effect securities transactions, a portion of which commissions shall be paid by APW Capital, Inc. to Ms. Keiling. The brokerage commissions charged by APW Capital, Inc. may be higher or lower than those charged by other broker-dealers. The securities commission business conducted by Ms. Keiling is separate and apart from Registrant’s investment management services discussed in the Registrant’s *Brochure*.
- B. **Licensed Insurance Agent.** Ms. Keiling, in her individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Ms. Keiling to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Ms. Keiling that a client purchase an insurance commission product presents a *conflict of interest*, as the receipt of commissions may provide an incentive to recommend insurance products based on commissions to be received, rather than on a particular client’s need. No client is under any obligation to purchase any insurance commission products from Ms. Keiling. Clients are reminded that they may purchase insurance products recommended by Ms. Keiling through other, non-affiliated insurance agents. **The Registrant’s Chief Compliance Officer, Marc L. Scudillo, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**

Item 5 Additional Compensation

None.

Item 6 Supervision

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "*Act*"). The Registrant's Chief Compliance Officer, Marc L. Scudillo, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Scudillo at (908) 429-0025.

Item 1 Cover Page

A.

Daniel Elie

EisnerAmper Wealth Management
& Corporate Benefits, LLC

ADV Part 2B, Brochure Supplement
Dated: May 5, 2020

Contact: Marc L. Scudillo, Chief Compliance Officer
111 Wood Avenue South, Suite 110
Iselin, New Jersey 08830

B.

This Brochure Supplement provides information about Daniel Elie that supplements the EisnerAmper Wealth Management & Corporate Benefits, LLC Brochure; you should have received a copy of that Brochure. Please contact Marc L. Scudillo, Chief Compliance Officer, if you did *not* receive EisnerAmper Wealth Management & Corporate Benefits, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Daniel Elie is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Education Background and Business Experience

Daniel Elie was born in 1957. Mr. Elie graduated from The University of Miami, with a Master in Law, an MBA and a JD from the University of Haiti. Mr. Elie has been employed as an investment adviser representative of EisnerAmper Wealth Management and Corporate Benefits, LLC since July 2019. From March 2003 through July 2019, Mr. Elie was the President of Dagle Financial. From March 2004 through July 2019, Mr. Elie was an Instructor with Kaplan Financial Education.

Mr. Elie has been a CERTIFIED FINANCIAL PLANNER™ since 1996. Certified Financial Planner Board of Standards, Inc. ("CFP Board") owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with flame design) logo in the United States (these marks are collectively referred to as the "CFP® marks"). The CFP Board authorizes use of the CFP® marks by individuals who successfully complete the CFP Board's initial and ongoing certification requirements.

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 86,000 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 a 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 or an accepted equivalent, including [completion of a financial plan development capstone course](#), and attain a Bachelor’s Degree from an accredited college or university. CFP Board’s financial planning subject areas include professional conduct and regulation, general principles of financial planning, education planning, risk management and insurance planning, investment planning, income tax planning, retirement savings and income planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 6 hours, 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 – CFP Board requires 6,000 hours of experience through the Standard Pathway, or 4,000 hours of experience through the Apprenticeship Pathway that meets additional requirements ; and
- Ethics – Agree to be bound by CFP Board’s *Code of Ethics and Standards of Conduct*, which put clients’ interest first; acknowledge CFP Board’s right to enforce them through its *Disciplinary Rules and Procedures*; comply with the *Financial Planning Practice Standards* which determine what clients should reasonably expect from the financial planning engagement and complete a CFP® Certification Application which requires disclosure of an individual’s background, including involvement in any criminal, civil, governmental, or self-regulatory agency proceeding or inquiry, bankruptcy, customer complaint, filing, termination/internal reviews conducted by the individual’s employer or firm.

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:

- Continuing Education – Complete 30 hours of continuing education hours accepted by the CFP Board 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

- Ethics – CFP® professionals agree to adhere to the high standards of ethics and practice outlined in CFP Board’s Code of Ethics and Standards of Conduct and to acknowledge CFP Board’s right to enforce them through its Disciplinary Rules and Procedures. The Code of Ethics and Standards of Conduct require that CFP Professionals provide financial planning services in the best interests of their clients.
- Certification Application – Properly complete a Certification Application to (i) acknowledge voluntary adherence to the [terms and conditions of certification with CFP Board](#) and (ii) disclose any involvement in criminal and civil proceedings, inquiries or investigations, bankruptcy filings, internal reviews and customer complaints.

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.

You may [verify an individual's CFP®](#) certification and background through the CFP Board. The verification function will allow you to verify an individual’s certification status, CFP Board’s disciplinary history and any bankruptcy disclosures in the past ten years. Additional regulatory information may also be found through [FINRA’S BrokerCheck](#) and the [SEC’s Investment Adviser Public Disclosure databases](#), which are free tools that may be used to conduct research on the background and experience of CFP® professionals and those who held CFP® certification at one time, including with respect to employment history, regulatory actions, and investment-related licensing information, arbitrations, and complaints.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. **Licensed Insurance Agent.** Mr. Elie, in his individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Mr. Elie to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Mr. Elie that a client purchase an insurance commission product presents a *conflict of interest*, as the receipt of commissions may provide an incentive to recommend insurance products based on commissions to be received, rather than on a particular client’s need. No client is under any obligation to purchase any insurance commission products from Mr. Elie. Clients are reminded that they may purchase insurance products recommended by Mr. Elie through other, non-affiliated insurance agents. **The Registrant’s Chief Compliance Officer, Marc L. Scudillo, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**

Item 5 Additional Compensation

Mr. Elie's annual compensation is based, in part, on the amount of assets under management that Mr. Elie introduces to the Registrant. Accordingly, Mr. Elie has a conflict of interest for recommending the Registrant to clients for investment advisory services, as the recommendation could be made on the basis of compensation to be received, rather than on a client or prospective client's best interests.

Item 6 Supervision

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "*Act*"). The Registrant's Chief Compliance Officer, Marc L. Scudillo, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Scudillo at (908) 429-0025.

Item 1 Cover Page

A.

Christopher M. Colyer

EisnerAmper Wealth Management
& Corporate Benefits, LLC

ADV Part 2B, Brochure Supplement
Dated: May 5, 2020

Contact: Marc L. Scudillo, Chief Compliance Officer
111 Wood Avenue South, Suite 110
Iselin, New Jersey 08830

B.

This Brochure Supplement provides information about Christopher M. Colyer that supplements the EisnerAmper Wealth Management & Corporate Benefits, LLC Brochure; you should have received a copy of that Brochure. Please contact Marc L. Scudillo, Chief Compliance Officer, if you did *not* receive EisnerAmper Wealth Management & Corporate Benefits, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Christopher M. Colyer is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Education Background and Business Experience

Christopher M. Colyer was born in 1976. Mr. Colyer graduated from Messiah College in 1999, with a Bachelor of Science degree in Accounting and an MBA in Finance from Rutgers University. Mr. Colyer has been employed an investment adviser representative of EisnerAmper Wealth Management and Corporate Benefits, LLC since January 2020. Mr. Colyer is also a Partner with EisnerAmper LLP. From August 2017 through January 2019, Mr. Colyer was an investment adviser representative of Wiss Private Client Advisors.

Mr. Colyer has held the designation of Certified Public Accountant ("CPA") since 1999. 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* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's *Code of Professional Conduct* within their state accountancy laws or have created their own.

In addition to the *Code of Professional Conduct*, AICPA members who provide personal financial planning services are required to follow the *Statement on Standards in Personal Financial Planning Services* (SSPFPS).

Mr. Colyer has held the designation of Personal Financial Specialist ("PFS") since 2017. The PFS credential demonstrates that an individual has met the minimum education, experience and testing required of a CPA in addition to a minimum level of expertise in personal financial planning. To attain the PFS credential, a candidate must hold an unrevoked CPA license, certificate, or permit, none of which are in inactive status; fulfill 3,000 hours of personal financial planning business experience; complete 75 hours of personal financial planning CPE credits; pass a comprehensive financial planning exam and be an active member of the AICPA. A PFS credential holder is required to adhere to AICPA's *Code of Professional Conduct* and the *Statement on Standards in Personal Financial Planning Services*, when providing personal financial planning services⁴. To maintain their PFS credential, the recipient must complete 60 hours of financial planning CPE credits every three years. The PFS credential is administered through the [AICPA](#).

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

- A. The supervised person is not actively engaged in any other investment-related businesses or occupations.
- B. **Licensed Insurance Agent**. Mr. Colyer, in his individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Mr. Colyer to purchase insurance products on a commission basis. **Conflict of Interest**: The recommendation by Mr. Colyer that a client purchase an insurance commission product presents a *conflict of interest*, as the receipt of commissions may provide an incentive to recommend insurance products based

on commissions to be received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Colyer. Clients are reminded that they may purchase insurance products recommended by Mr. Colyer through other, non-affiliated insurance agents. **The Registrant's Chief Compliance Officer, Marc L. Scudillo, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**

Certified Public Accountant (CPA). Mr. Colyer, in his individual capacity, is a certified public accountant, and may recommend his tax preparation and/or accounting services. **Conflict of Interest:** The recommendation by Mr. Colyer that a client elect his accounting services presents a *conflict of interest*, as the receipt of fees for accounting services may provide an incentive to recommend such services, rather than recommending such services based upon a particular client's needs. No client is under any obligation to utilize Mr. Colyer for accounting services. Clients are reminded that they may elect to obtain accounting services recommended by Mr. Colyer through other non-affiliated certified public accountants. **The Registrant's Chief Compliance Officer, Marc L. Scudillo, remains available to address any questions that a client or prospective may have regarding the above conflict of interest.**

Item 5 Additional Compensation

Mr. Colyer's annual compensation is based, in part, on the amount of assets under management that Mr. Colyer introduces to the Registrant. Accordingly, Mr. Colyer has a conflict of interest for recommending the Registrant to clients for investment advisory services, as the recommendation could be made on the basis of compensation to be received, rather than on a client or prospective client's best interests.

Item 6 Supervision

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "*Act*"). The Registrant's Chief Compliance Officer, Marc L. Scudillo, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Scudillo at (908) 429-0025.