

## **James Michael O'Brien II**

### **McKinley Carter Wealth Services, Inc.**

2100 Market Street  
Wheeling, WV 26003  
www.mc-ws.com  
(724) 940-4400



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This Brochure Supplement provides information about James Michael O'Brien that supplements the Disclosure Brochure of McKinley Carter Wealth Services, Inc. (hereinafter "MCWS"), a copy of which you should have received. Please contact MCWS's Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about James Michael O'Brien is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

McKinley Carter Wealth Services, a Registered Investment Adviser  
2100 Market Street, Wheeling, WV 26003 | (304) 230-2400  
www.mc-ws.com | [www.smartforyourmoney.com](http://www.smartforyourmoney.com)

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

**James Michael O'Brien**

Born 1993

### **Post-Secondary Education**

Wheeling Jesuit University | B.A., Accounting | 2019

Wheeling Jesuit University | B.S., Business Administration with a concentration in Finance | 2019

West Virginia University | Master of Business Administration | 2021

### **Recent Business Background**

McKinley Carter Wealth Services, Inc. | Client Coordinator | October 2021 – Present

## **Item 3. Disciplinary Information**

MCWS is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of James Michael O'Brien. MCWS has no information to disclose in relation to this Item.

## **Item 4. Other Business Activities**

MCWS is required to disclose information regarding any investment-related business or occupation in which James Michael O'Brien is actively engaged. MCWS has no information to disclose in relation to this Item.

## **Item 5. Additional Compensation**

MCWS is required to disclose information regarding any arrangement under which James Michael O'Brien receives an economic benefit from someone other than a client for providing investment advisory services. James Michael O'Brien has no information to disclose in relation to this Item.

## **Item 6. Supervision**

Brian Gongaware, Chief Compliance Officer, is generally responsible for supervising James Michael O'Brien's advisory activities on behalf of MCWS. The telephone number to reach Brian Gongaware is (724) 940-4400.

MCWS supervises its personnel and the investments made in client accounts. MCWS monitors the investments recommended by James Michael O'Brien to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. MCWS periodically reviews the advisory activities of James Michael O'Brien, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by James Michael O'Brien.