WALDRON
Private Wealth

ITEM 1. COVER PAGE

John J. Waldron

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: April 2, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about John J. Waldron (CRD # 1864267) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about John J. Waldron is available on the SEC's website at www.adviserinfo.sec.gov.

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

John J. Waldron | Born 1959

Post-Secondary Education

Robert Morris University | B.S., Accounting | 1982

Recent Business Background

Waldron Private Wealth, LLC | Executive Chairman | January 2026 – Present

Waldron Private Wealth, LLC | Chief Executive Officer | September 1995 – December 2025

Waldron Private Wealth, LLC | President | September 1995 – April 2015

Purshe Kaplan Sterling Investments | Investment Adviser Representative | December 2012 – December 2018

LPL Financial Corporation | Investment Adviser Representative | September 1995 – December 2012

The Fragasso Group, Inc. | Investment Adviser Representative | January 2003 – November 2012

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of John J. Waldron. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which John J. Waldron is actively engaged.

Licensed Insurance Agent. Mr. Waldron, 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. Waldron to effect insurance transactions on a commission basis. Conflict of Interest: The recommendation by Mr. Waldron that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Waldron. Clients are reminded that they may purchase insurance products recommended by the Registrant through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.

Trustee. On a limited basis, Mr. Waldron serves as trustee for clients whom the Registrant provides investment advisory services. Conflict of Interest: A conflict of interest occurs when Mr. Waldron's personal or business interests potentially conflict with their responsibilities to the trust beneficiaries. Clients are reminded that they are under no obligation to use the Registrant or its affiliates for trustee services. The Registrant's Chief Compliance Officer, Mary Keegan, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.

Director of RE Holding Company. Mr. Waldron is director of real estate holding company.

ITEM 5. ADDITIONAL COMPENSATION

Waldron Private Wealth is required to disclose information regarding any arrangement under which John J. Waldron receives an economic benefit from someone other than a client for providing investment advisory services.

Mr. Waldron's annual compensation is based, in part, on the number of clients that Mr. Waldron introduces to the Registrant. Accordingly, Mr. Waldron 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Matthew Helfrich

ADV Part 2B, Brochure Supplement

Dated: July 9, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Matthew Helfrich (CRD # 4344282) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Matthew Helfrich | Born 1981

Post-Secondary Education

Duquesne University | B.S., Investment Management | 2003

Recent Business Background

Waldron Private Wealth, LLC | Chief Executive Officer | January 2026 – Present

Waldron Private Wealth, LLC | Partner | January 2018 – Present

Waldron Private Wealth, LLC | President | April 2015 – Present

Waldron Private Wealth, LLC | Chief Compliance Officer | January 2012 – December 2023

Waldron Private Wealth LLC | Chief Investment Officer | January 2012 – April 2015

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Helfrich is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Matthew Helfrich. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Matthew Helfrich is actively engaged.

Licensed Insurance Agent. Mr. Helfrich, 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. Helfrich to effect insurance transactions on a commission basis. Conflict of Interest: The recommendation by Mr. Helfrich that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Helfrich. Clients are reminded that they may purchase insurance products recommended by the Registrant through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.

Trustee. On a limited basis, Mr. Helfrich serves as trustee for clients whom the Registrant provides investment advisory services. Conflict of Interest: A conflict of interest occurs when Mr. Helfrich's personal or business interests potentially conflict with their responsibilities to the trust beneficiaries. Clients are reminded that they are under no obligation to use the Registrant or its affiliates for trustee services. The Registrant's Chief Compliance Officer, Mary Keegan, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.

Committee Member. Mr. Helfrich is a member of Duquesne University's Audit & Finance Committee.

Board Member. Mr. Helfrich serves on the Board of Directors for the Propel Schools Foundation.

Board Member. Mr. Helfrich serves on the Board of Directors for Pace School.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Helfrich's annual compensation is based, in part, on the number of clients that Mr. Helfrich introduces to the Registrant. Accordingly, Mr. Helfrich 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

WALDRON
Private Wealth

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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Michael E. Krol

177 N. Main Street, Suite 200

Plymouth, MI 48170

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: July 9, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Michael E. Krol (CRD # 4855869) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Michael E. Krol is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael E. Krol | Born 1979

Post-Secondary Education

Duquesne University | B.S., Accounting and Information Technology | 2001

Recent Business Background

Waldron Private Wealth, LLC | Partner | January 2018 – Present

Waldron Private Wealth, LLC | Head of Wealth Advisory | January 2018 – Present

Waldron Private Wealth, LLC | Chief Service Officer | January 2015 – January 2018

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Krol is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP

Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Michael E. Krol. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Michael E. Krol is actively engaged.

Licensed Insurance Agent. Mr. Krol, 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. Krol to effect insurance transactions on a commission basis. Conflict of Interest: The recommendation by Mr. Krol that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Krol. Clients are reminded that they may purchase insurance products recommended by the Registrant through other, non-affiliated insurance agents. Mr. Krol is licensed to sell insurance in Pennsylvania. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Krol's annual compensation is based, in part, on the number of clients that Mr. Krol introduces to the Registrant. Accordingly, Mr. Krol 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

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WALDRON
Private Wealth

ITEM 1. COVER PAGE

Benjamin M. Greenfeld

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: October 10, 2024

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Benjamin M. Greenfeld (CRD # 5272549) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Benjamin M. Greenfeld | Born 1984

Post-Secondary Education

Duquesne University | B.S., Finance | 2006

Recent Business Background

Waldron Private Wealth, LLC | Partner | January 2018 – Present

Waldron Private Wealth, LLC | Chief Investment Officer | April 2015 – Present

Waldron Private Wealth, LLC | Director – Investments | January 2014 – April 2015

Waldron Private Wealth, LLC | Senior Investment Analyst | March 2011 – January 2014

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Greenfeld is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

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- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Benjamin M. Greenfeld. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Benjamin M. Greenfeld is actively engaged.

Licensed Insurance Agent. Mr. Greenfeld, 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. Greenfeld to purchase insurance products on a commission basis. Conflict of Interest: The recommendation by Mr. Greenfeld 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. Greenfeld. Clients are reminded that they may purchase insurance products recommended by Mr. Greenfeld through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.

Trustee. On a limited basis, Mr. Greenfeld serves as trustee for clients whom the Registrant provides investment advisory services. Conflict of Interest: A conflict of interest occurs when Mr. Greenfeld's personal or business interests potentially conflict with their responsibilities to the trust beneficiaries. Clients are reminded that they are under no obligation to use the Registrant or its affiliates for trustee services. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Greenfeld's annual compensation is based, in part, on the number of clients that Mr. Greenfeld introduces to the Registrant. Accordingly, Mr. Greenfeld 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Robert H. Wyche

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: July 9, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Robert H. Wyche (CRD # 6486897) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Robert H. Wyche is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Robert H. Wyche | Born 1977

Post-Secondary Education

Campbell University | B.S.B.A., Trust Management | 2000

University of Pittsburgh | M.B.A. | 2009

Recent Business Background

Waldron Private Wealth, LLC | Managing Director | January 2023 – Present

Waldron Private Wealth, LLC | Partner | January 2018 – Present

Waldron Private Wealth, LLC | Managing Director – Wealth Advisors | January 2018 – January 2023

Waldron Private Wealth, LLC | Wealth Counselor | April 2015 – January 2018

Professional Designations

Accredited Trust and Fiduciary Advisor

Mr. Wyche holds the Accredited Trust and Fiduciary Advisor ("ATFA") certification through the Trust & Wealth Management Program offered by Campbell University and may refer to himself as an Accredit Trust Fiduciary Advisor. The ATFA certification is voluntary. No federal or state law or regulation requires financial planners or trust professionals to hold the ATFA certification. You may find more information about the ATFA certification at www.trusteducationfoundation.com.

To become an ATFA certification holder, an individual must fulfill the following requirements:

- Grandfather option – Fiduciaries at the office level with at least 10 years of experience in the financial services industry, a minimum of five of which are in trust account administration, are eligible to apply to be "grandfathered" and acquire the ATFA Certification without sitting for the examination. In order to be considered, applicants must also meet one of the following criteria: (1) hold an active ongoing fiduciary certification. Licensed attorneys whose primary work focus is trust and wealth management are invited to apply, or (2) hold an undergraduate or graduate Trust & Wealth Management degree from Campbell University.
- Campbell University graduates - Graduates of Campbell's undergraduate or graduate Trust & Wealth Management programs are immediately eligible to sit for the ATFA Examination upon graduation and will be granted the ATFA certification once they have at least three years of experience in the financial services industry, a minimum of two of those years being in trust account administration.
- Other applicants - Fiduciaries not meeting the work experience requirement to "grandfather" must successfully complete the following:
    - Trust Advisors Institute, Fiduciary Fundamentals
    - Trust Advisors Institute, Advanced Practices, and
    - The ATFA Examination

Holders of the ATFA certification must complete forty-five hours of approved continuing education (for calculation purposes one hour equals sixty minutes) every three years in order to maintain their certification. The required core disciplines for CE credit are as follows: (1) fiduciary and trust activities, (2) financial planning, (3) tax law and planning, and (4) investment management.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Robert H. Wyche. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Robert H. Wyche is actively engaged.

Trustee. On a limited basis, Mr. Wyche serves as trustee for clients whom the Registrant provides investment advisory services. Conflict of Interest: A conflict of interest occurs when Mr. Wyche's personal or business interests potentially conflict with their responsibilities to the trust beneficiaries. Clients are reminded that they are under no obligation to use the Registrant or its affiliates for trustee services. The Registrant's Chief Compliance Officer, Mary Keegan, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.

Director. Mr. Wyche serves on the board for Stern Asset Management.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Wyche's annual compensation is based, in part, on the number of clients that Mr. Wyche introduces to the Registrant. Accordingly, Mr. Wyche 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

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WALDRON
Private Wealth

ITEM 1. COVER PAGE

Carmen J. Palmieri

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: July 9, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Carmen J. Palmieri (CRD # 5744484) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Carmen J. Palmieri is available on the SEC's website at www.adviserinfo.sec.gov.

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ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Carmen J. Palmieri | Born 1981

Post-Secondary Education

University of Delaware | B.S., Business Administration | 2003

Duquesne University | M.B.A. | 2006

Recent Business Background

Waldron Private Wealth, LLC | Partner | December 2022 – Present

Waldron Private Wealth, LLC | Managing Director – Family Office Services | December 2021 – Present

Waldron Private Wealth, LLC | Senior Wealth Strategist | January 2021 – December 2021

Waldron Private Wealth, LLC | Director – Investments | January 2015 – January 2021

Professional Designations

Chartered Financial Analyst®

Mr. Palmieri has been a CFA® Charterholder since 2015. 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 200,000 CFA® Charterholders working in over 170 countries and regions. To earn the CFA® charter, Mr. Palmieri: (1) passed three sequential, six-hour examinations; (2) had at least four years of qualified professional investment experience; (3) became a member of the CFA Institute; and (4) committed to abide by, and annually reaffirm their adherence to, the CFA Institute Code of Ethics and Standards of Professional Conduct. In 2023, the requirements to earn the CFA® charter were updated to include the addition of professional references and a revision to the work experience requirement, now defined as at least 4,000 hours of relevant work experience over at least 36 months.

High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA® Charterholders 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.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Carmen J. Palmieri. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Carmen J. Palmieri is actively engaged.

Licensed Insurance Agent. Mr. Palmieri, 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. Palmieri to effect insurance transactions on a commission basis. Conflict of Interest: The recommendation by Mr. Palmieri that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Palmieri. Clients are reminded that they may purchase insurance products recommended by the Registrant through other, non-affiliated insurance agents. Mr. Palmieri is licensed to sell insurance in Pennsylvania. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Palmieri's annual compensation is based, in part, on the number of clients that Mr. Palmieri introduces to the Registrant. Accordingly, Mr. Palmieri 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

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ITEM 1. COVER PAGE

Ali C. Swart

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: April 2, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Ali C. Swart (CRD # 5781820) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Ali C. Swart is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Ali C. Swart | Born 1986

Post-Secondary Education

Marietta College | B.A., Marketing and Management Information Systems | 2008

Florida Atlantic University | M.B.A. | 2010

Recent Business Background

Waldron Private Wealth, LLC | Partner | December 2022 – Present

Waldron Private Wealth, LLC | Managing Director – Wealth Planning | June 2022 – Present

Waldron Private Wealth, LLC | Director – Wealth Planning | February 2018 – June 2022

Professional Designations

Executive Certificate in Financial Planning
Ms. Swart completed the Executive Certificate in Financial Planning in 2012. The Executive Certificate in Financial Planning is a sequential six-course certificate program offered in Pittsburgh at Duquesne University. The program is designed to be completed in nine months and the curriculum focuses on the technical aspects, practical application, and ethics and professionalism of financial planning.

CERTIFIED FINANCIAL PLANNER® Professional
Ms. Swart is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, she may refer to herself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and she may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Ali C. Swart. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Ali C. Swart is actively engaged.

Licensed Insurance Agent. Ms. Swart, 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. Swart to purchase insurance products on a commission basis. Conflict of Interest: The recommendation by Ms. Swart 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. Swart. Clients are reminded that they may purchase insurance products recommended by Ms. Swart through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.

Board Member. Ms. Swart is a board member of the Financial Planning Association.

ITEM 5. ADDITIONAL COMPENSATION

Ms. Swart's annual compensation is based, in part, on the number of clients that Ms. Swart introduces to the Registrant. Accordingly, Ms. Swart 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Eric C. Vogt

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: April 2, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Eric C. Vogt (CRD # 5150466) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Eric C. Vogt is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Eric C. Vogt | Born 1984

Post-Secondary Education

Miami University of Ohio | B.A., Finance | 2006

Villanova University | M.S., Taxation | 2022

Recent Business Background

Waldron Private Wealth, LLC | Partner | December 2022 – Present

Waldron Private Wealth, LLC | Senior Wealth Strategist | May 2020 – Present

Waldron Private Wealth, LLC | Wealth Advisor | January 2018 – May 2020

Waldron Private Wealth, LLC | Wealth Counselor | January 2002 – January 2018

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Vogt is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Eric C. Vogt. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Eric C. Vogt is actively engaged.

Licensed Insurance Agent. Mr. Vogt, 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. Vogt to affect insurance transactions on a commission basis. Conflict of Interest: The recommendation by Mr. Vogt that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Vogt. Clients are reminded that they may purchase insurance products recommended by the Registrant through other, non-affiliated insurance agents. Mr. Vogt is licensed to sell insurance in Pennsylvania. The Registrant's Chief Compliance Officer, Mary Keegan, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.

Trustee. On a limited basis, Mr. Vogt serves as trustee for clients whom the Registrant provides investment advisory services. Conflict of Interest: A conflict of interest occurs when Mr. Vogt's personal or business interests potentially conflict with their responsibilities to the trust beneficiaries. Clients are reminded that they are under no obligation to use the Registrant or its affiliates for trustee services. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Vogt's annual compensation is based, in part, on the number of clients that Mr. Vogt introduces to the Registrant. Accordingly, Mr. Vogt 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

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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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Nathaniel L. Ecoff

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: January 14, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Nathaniel L. Ecoff (CRD # 6921473) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Nathaniel L. Ecoff | Born 1987

Post-Secondary Education

Penn State University | B.S., Finance | 2010

Recent Business Background

Waldron Private Wealth, LLC | Partner | December 2025 – Present

Waldron Private Wealth, LLC | Managing Director – Investments | July 2023 – Present

Waldron Private Wealth, LLC | Senior Director – Investments | December 2022 – July 2023

Waldron Private Wealth, LLC | Director – Investments | May 2019 – December 2022

Wills Towers Watson | Investment Consultant | May 2015 – May 2019

Professional Designations

Chartered Financial Analyst®

Mr. Ecoff has been a CFA® Charterholder since 2015. 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 200,000 CFA® Charterholders working in over 170 countries and regions. To earn the CFA® charter, Mr. Ecoff: (1) passed three sequential, six-hour examinations; (2) had at least four years of qualified professional investment experience; (3) became a member of the CFA Institute; and (4) committed to abide by, and annually reaffirm their adherence to, the CFA Institute Code of Ethics and Standards of Professional Conduct. In 2023, the requirements to earn the CFA® charter were updated to include the addition of professional references and a revision to the work experience requirement, now defined as at least 4,000 hours of relevant work experience over at least 36 months.

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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.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Nathaniel L. Ecoff. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Nathaniel L. Ecoff is actively engaged.

Licensed Insurance Agent. Mr. Ecoff, 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. Ecoff to purchase insurance products on a commission basis. Conflict of Interest: The recommendation by Mr. Ecoff 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. Ecoff. Clients are reminded that they may purchase insurance products recommended by Ms. Ecoff through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Ecoff's annual compensation is based, in part, on the number of clients that Mr. Ecoff introduces to the Registrant. Accordingly, Mr. Ecoff 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Noah Bushlow

989 Old Eagle School Road, Suite 810

Wayne, PA 19087

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: January 14, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Noah Bushlow (CRD # 8084472) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Noah Bushlow | Born 2002

Post-Secondary Education

University of Pittsburgh | B.S.B.A., Finance and Accounting, Minor in Economics | 2024

Recent Business Background

Waldron Private Wealth, LLC | Investment Analyst | January 2026 – Present

Waldron Private Wealth, LLC | Investment Associate | May 2024 – January 2026

Waldron Private Wealth, LLC | Investment Intern | January 2023 – May 2024

University of Pittsburgh | Student | June 2020 – April 2024

Thermo Fisher Scientific Inc. | International Tax Intern | May 2022 – January 2023

Bronx High School of Science | Student | September 2016 – June 2020

Russell Sage Junior High School | Student | January 2015 – September 2016

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Noah Bushlow. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Bushlow's annual compensation is based, in part, on the number of clients that Mr. Bushlow introduces to the Registrant. Accordingly, Mr. Bushlow 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Nicholas A. Colaizzi

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: April 2, 2025

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Nicholas A. Colaizzi (CRD # 6969981) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Nicholas A. Colaizzi is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Nicholas A. Colaizzi | Born 1997

Post-Secondary Education

Robert Morris University | B.S., Finance | 2019

Recent Business Background

Waldron Private Wealth, LLC | Investment Strategist | December 2022 – Present

Waldron Private Wealth, LLC | Senior Investment Analyst | January 2022 – December 2022

Waldron Private Wealth, LLC | Investment Analyst | January 2020 – January 2022

Waldron Private Wealth, LLC | Investment Associate | January 2017 – January 2020

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Colaizzi is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial

advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Nicholas A. Colaizzi. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Nicholas A. Colaizzi is actively engaged.

Licensed Insurance Agent. Mr. Colaizzi, 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. Colaizzi to effect insurance transactions on a commission basis. Conflict of Interest: The recommendation by Mr. Colaizzi that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Colaizzi. Clients are reminded that they may purchase insurance products recommended by the Registrant through other, non-affiliated insurance agents. Mr. Colaizzi is licensed to sell insurance in Pennsylvania. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Colaizzi's annual compensation is based, in part, on the number of clients that Mr. Colaizzi introduces to the Registrant. Accordingly, Mr. Colaizzi 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Chase D. Conti

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: January 9, 2025

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Chase D. Conti (CRD # 5930586) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Chase D. Conti is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Chase D. Conti | Born 1988

Post-Secondary Education

Robert Morris University | B.S.B.A., Finance and Accounting | 2011

Recent Business Background

Waldron Private Wealth, LLC | Director – Wealth Planning | January 2025 – Present

Waldron Private Wealth, LLC | Director – Investments | May 2022 – December 2024

Waldron Private Wealth, LLC | Senior Investment Analyst | January 2019 – May 2022

Waldron Private Wealth, LLC | Investment Analyst | July 2013 – January 2019

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Conti is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial

advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Chartered Alternative Investment Analyst

Mr. Conti holds the Chartered Alternative Investment Analyst (CAIA®) designation, which is issued by the CAIA Association®. To earn the CAIA® designation, candidates must pass the CAIA Association®'s Level I and II exams, and have a bachelor's degree and one year of professional experience in the field of alternative investment analysis or other regulatory, banking, financial, or related field (or alternatively a minimum of four years of professional experience in the field of alternative investment analysis or other regulatory, banking, financial, or related field). Currently, there are no continuing education requirements. Chartered Alternative Investment Analyst is a certification mark and CAIA® is a registered certification mark owned and administered by the CAIA Association®.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Chase D. Conti. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Chase D. Conti is actively engaged.

Licensed Insurance Agent. Mr. Conti, 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. Conti to purchase insurance products on a commission basis. Conflict of Interest: The recommendation by Mr. Conti 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. Conti. Clients are reminded that they may purchase insurance products recommended by Mr. Conti through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Conti's annual compensation is based, in part, on the number of clients that Mr. Conti introduces to the Registrant. Accordingly, Mr. Conti 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Kelly P. Costello

177 N. Main Street, Suite 200

Plymouth, MI 48170

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: January 8, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Kelly P. Costello (CRD # 4425375) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Kelly P. Costello is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kelly P. Costello | Born 1977

Post-Secondary Education

Rutgers University | B.S., Economics | 2001

Recent Business Background

Waldron Private Wealth, LLC | Director – Wealth Planning | January 2024 – Present

Raymond James & Associates | Financial Advisor | May 2017 – January 2024

Wells Fargo Advisors | Financial Advisor | February 2012 – March 2017

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Kelly P. Costello. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Kelly P. Costello is actively engaged.

Licensed Insurance Agent. Mr. Costello, 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. Costello to effect insurance transactions on a commission basis. Conflict of Interest: The recommendation by Mr. Costello that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Costello. Clients are reminded that they may purchase insurance products recommended by the Registrant through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Costello's annual compensation is based, in part, on the number of clients that Mr. Costello introduces to the Registrant. Accordingly, Mr. Costello 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
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ITEM 1. COVER PAGE

Madison T. Daggett

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: October 10, 2025

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Madison T. Daggett (CRD # 6973705) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Madison T. Daggett is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Madison T. Daggett | Born 1997

Post-Secondary Education

University of Pittsburgh | B.S., Economics and Mathematics | 2018

Recent Business Background

Waldron Private Wealth, LLC | Compliance Specialist | October 2025 – Present

Waldron Private Wealth, LLC | Senior Analyst – Investments | December 2024 – October 2025

Waldron Private Wealth, LLC | Investment Analyst | January 2022 – December 2024

Waldron Private Wealth, LLC | Investment Associate | January 2020 – January 2022

Northwestern Mutual Investment Service, LLC. | Registered Representative | January 2019 – January 2020

Craig Fiedler | Agent Assistant | June 2018 – October 2018

Craig Fiedler | Associate Agent | October 2018 – December 2019

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Ms. Daggett is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, she may refer to herself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and she may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
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- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Madison T. Daggett. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Madison T. Daggett is actively engaged.

Licensed Insurance Agent. Ms. Daggett, 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. Daggett to purchase insurance products on a commission basis. Conflict of Interest: The recommendation by Ms. Daggett 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. Daggett. Clients are reminded that they may purchase insurance products recommended by Ms. Daggett through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.

ITEM 5. ADDITIONAL COMPENSATION

Ms. Daggett's annual compensation is based, in part, on the number of clients that Ms. Daggett introduces to the Registrant. Accordingly, Ms. Daggett 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Patrick J. Ellsworth

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: October 10, 2024

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Patrick J. Ellsworth (CRD # 6829455) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Patrick J. Ellsworth is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Patrick J. Ellsworth | Born 1995

Post-Secondary Education

Penn State University | B.S. Economics | 2017

Recent Business Background

Waldron Private Wealth, LLC | Strategist - Investments | January 2024 – Present

Waldron Private Wealth, LLC | Senior Analyst - Investments | December 2022 – December 2023

Waldron Private Wealth, LLC | Investment Analyst | February 2022 – December 2022

HBKS Wealth Advisors | Investment Analyst | October 2018 – February 2022

Professional Designations

Chartered Financial Analyst®
Mr. Ellsworth has been a CFA® Charterholder since 2021. 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 200,000 CFA® Charterholders working in over 170 countries and regions. To earn the CFA® charter, Mr. Ellsworth: (1) passed three sequential, six-hour examinations; (2) had at least four years of qualified professional investment experience; (3) became a member of the CFA Institute; and (4) committed to abide by, and annually reaffirm their adherence to, the CFA Institute Code of Ethics and Standards of Professional Conduct. In 2023, the requirements to earn the CFA® charter were updated to include the addition of professional references and a revision to the work experience requirement, now defined as at least 4,000 hours of relevant work experience over at least 36 months.

High Ethical Standards
The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA® Charterholders 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.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Patrick J. Ellsworth. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Patrick J. Ellsworth is actively engaged.

Licensed Insurance Agent. Mr. Ellsworth, 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. Ellsworth to effect insurance transactions on a commission basis. Conflict of Interest: The recommendation by Mr. Ellsworth that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Ellsworth. Clients are reminded that they may purchase insurance products recommended by the Registrant through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Ellsworth's annual compensation is based, in part, on the number of clients that Mr. Ellsworth introduces to the Registrant. Accordingly, Mr. Ellsworth 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

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WALDRON
Private Wealth

ITEM 1. COVER PAGE

Aaron Filbeck

989 Old Eagle School Road, Suite 810

Wayne, PA 19087

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: August 26, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Aaron Filbeck (CRD # 8330761) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Aaron Filbeck | Born 1993

Post-Secondary Education

Penn State University | Masters, Finance | 2019

Penn State University | B.S., Finance | 2015

Recent Business Background

Waldron Private Wealth, LLC | Senior Director – Investments | August 2026 – Present

CAIA Association | Managing Director, Content & Community Strategy | November 2024 – July 2026

CAIA Association | Managing Director, Head of CAIA.nxt | November 2021 – November 2024

CAIA Association | Director of Global Content Development | December 2020 – November 2021

Professional Designations

Chartered Financial Analyst®

Mr. Filbeck has been a CFA® Charterholder since 2017. 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 200,000 CFA® Charterholders working in over 170 countries and regions. To earn the CFA® charter, Mr. Filbeck: (1) passed three sequential, six-hour examinations; (2) had at least four years of qualified professional investment experience; (3) became a member of the CFA Institute; and (4) committed to abide by, and annually reaffirm their adherence to, the CFA Institute Code of Ethics and Standards of Professional Conduct. In 2023, the requirements to earn the CFA® charter were updated to include the addition of professional references and a revision to the work experience requirement, now defined as at least 4,000 hours of relevant work experience over at least 36 months.

High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA® Charterholders 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.

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Filbeck is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Chartered Alternative Investment Analyst

Mr. Filbeck holds the Chartered Alternative Investment Analyst (CAIA®) designation, which is issued by the CAIA Association®. To earn the CAIA® designation, candidates must pass the CAIA Association®'s Level I and II exams, and have a bachelor's degree and one year of professional experience in the field of alternative investment analysis or other regulatory, banking, financial, or related field (or

alternatively a minimum of four years of professional experience in the field of alternative investment analysis or other regulatory, banking, financial, or related field). Currently, there are no continuing education requirements. Chartered Alternative Investment Analyst is a certification mark and CAIA® is a registered certification mark owned and administered by the CAIA Association®.

Certificate in Investment Performance Measurement
Mr. Filbeck holds the Certificate in Investment Performance Measurement (CIPM®) designation, issued by the CFA Institute. The CIPM® program requires completion of a two-level self-study curriculum, encompassing investment performance evaluation, risk analysis, portfolio attribution, manager selection, and the Global Investment Performance Standards (GIPS®).

To earn the CIPM® designation, candidates must pass two examinations and become regular members of the CFA Institute. There are no formal prerequisites for enrollment, however CFA® Charterholders or CFA Program candidates who have passed Level III are eligible may register directly for Level II. CIPM® designation holders are required to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct and must complete 15 continuing education credits annually to maintain the designation.

Financial Data Professional
Mr. Filbeck holds the Financial Data Professional (FDP) designation, issued by the FDP Institute, which is affiliated with the CAIA Association. The FDP program is a self-study curriculum designed to educate investment professionals in the practical application of data science to financial analysis, including machine learning, artificial intelligence, and alternative data. The FDP designation is designed to complement traditional finance credentials by equipping practitioners with quantitative and data-driven analytical skills.

To earn the FDP designation, candidates must complete the online courses, pass the FDP examination, commit to the FDP Institute's Code of Ethics policy, and submit two (2) professional or educational references. There are no prerequisites for registration. FDP designees are subject to the FDP Institute's Code of Ethics. Currently, there are no continuing education requirements.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Aaron Filbeck. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Aaron Filbeck is actively engaged.

Adjunct Professor. Mr. Filbeck periodically teaches online courses for Penn State University relating to finance, accounting, retirement planning, and/or investments.

Program Instructor. Mr. Filbeck serves as an occasional lecturer for the Investments & Wealth Institute (IWI) in connection with IWI's Certified Private Wealth Adviser (CPWA®) and Certified Investment Management Analyst (CIMA®) designation programs.

Vice President of Board. Mr. Filbeck serves as Vice President on the CFA Society Philadelphia's Board of Directors.

Committee Member. Mr. Filbeck serves as a Chapter Executive for the CAIA Pennsylvania Chapter.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Filbeck's annual compensation is based, in part, on the number of clients that Mr. Filbeck introduces to the Registrant. Accordingly, Mr. Filbeck 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

William A. Groom

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: October 10, 2024

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about William A. Groom (CRD # 7041264) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about William A. Groom is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

William A. Groom | Born 1997

Post-Secondary Education

Robert Morris University | B.S.B.A., Finance and Economics | 2019

Recent Business Background

Waldron Private Wealth, LLC | Wealth Planning Strategist | January 2024 – Present

Waldron Private Wealth, LLC | Wealth Planning Senior Analyst | January 2022 – December 2023

Waldron Private Wealth, LLC | Wealth Planning Analyst | March 2020 – January 2022

Waldron Private Wealth, LLC | Wealth Planning Senior Associate | November 2019 – March 2020

Waldron Private Wealth, LLC | Wealth Planning Associate | June 2019 – November 2019

Waldron Private Wealth, LLC | Wealth Planning Intern | August 2017 – June 2019

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Groom is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

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- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of William A. Groom. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which William A. Groom is actively engaged.

Licensed Insurance Agent. Mr. Groom, 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. Groom to purchase insurance products on a commission basis. Conflict of Interest: The recommendation by Mr. Groom 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. Groom. Clients are reminded that they may purchase insurance products recommended by Mr. Groom through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Groom's annual compensation is based, in part, on the number of clients that Mr. Groom introduces to the Registrant. Accordingly, Mr. Groom 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

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WALDRON
Private Wealth

ITEM 1. COVER PAGE

Alex G. Hendrickson

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: July 9, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Alex G. Hendrickson (CRD # 6591455) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Alex G. Hendrickson is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Alex G. Hendrickson | Born 1993

Post-Secondary Education

University of Pittsburgh | B.S., Business Administration | 2015

Recent Business Background

Waldron Private Wealth, LLC | Director – Investments | December 2024 – Present

Waldron Private Wealth, LLC | Investment Strategist | October 2022 – December 2024

Waldron Private Wealth, LLC | Senior Investment Analyst | September 2020 – October 2022

Legend Financial Advisors, Inc. | Assistant Advisor | June 2015 – September 2020

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Hendrickson is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
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advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Alex G. Hendrickson. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Alex G. Hendrickson is actively engaged.

Licensed Insurance Agent. Mr. Hendrickson, 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. Hendrickson to purchase insurance products on a commission basis. Conflict of Interest: The recommendation by Hendrickson 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. Hendrickson. Clients are reminded that they may purchase insurance products recommended by Mr. Hendrickson through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Hendrickson's annual compensation is based, in part, on the number of clients that Mr. Hendrickson introduces to the Registrant. Accordingly, Mr. Hendrickson 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

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WALDRON
Private Wealth

ITEM 1. COVER PAGE

Stephen Kajmo

989 Old Eagle School Road, Suite 810

Wayne, PA 19087

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: November 24, 2025

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Stephen Kajmo (CRD # 7318203) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Stephen Kajmo | Born 1995

Post-Secondary Education

Temple University | B.A, Personal Finance | 2018

Recent Business Background

Waldron Private Wealth, LLC | Wealth Planning Analyst | November 2025 – Present

Hirtle Callaghan & Co | Senior Portfolio Implementation Analyst | April 2022 – November 2025

Financial Independence Planning, LLC | Client Service Representative | November 2020 – April 2022

Ascensus | Client Service Representative | July 2018 – November 2020

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Kajmo is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Stephen Kajmo. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Kajmo's annual compensation is based, in part, on the number of clients that Mr. Kajmo introduces to the Registrant. Accordingly, Mr. Kajmo 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

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WALDRON
Private Wealth

ITEM 1. COVER PAGE

Mary E. Keegan

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: October 10, 2024

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Mary E. Keegan (CRD # 7058741) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Mary E. Keegan is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Mary E. Keegan | Born 1987

Post-Secondary Education

Syracuse University College of Law | J.D. | 2013

Syracuse University | M.S., Cultural Foundations of Education | 2013

SUNY Geneseo | B.A., Communication | 2009

Recent Business Background

Waldron Private Wealth, LLC | Chief Compliance Officer | January 2024 – Present

Waldron Private Wealth, LLC | Senior Director Legal and Compliance | October 2022 – December 2023

Moralis Technologies, LLC | Chief Counsel and Chief Compliance Officer | October 2021 – October 2022

MFA Wealth Advisors, LLC | Chief Compliance Officer | March 2019 – October 2022

MFA Wealth Advisors, LLC | Chief Counsel | July 2018 – October 2022

Hardin Compliance Consulting LLC | Compliance Consultant | March 2014 – July 2018

Professional Designations

Investment Adviser Certified Compliance Professional
Mary E. Keegan holds the professional designations Investment Adviser Certified Compliance Professional (IACCP®).

The IACCP® designation is a professional certification awarded by National Regulatory Services (NRS) and the Investment Adviser Association (IAA) to individuals who complete an online and/or in-person instructor-led program of study, pass a certifying examination, and meet its work experience, ethics and continuing education requirements. Recipients of the IACCP® certification have completed 15 required compliance courses, 5 electives, 2 years of work experience, submission of the ethics commitment and assessment, and the certifying examination. The designation signifies knowledge of investment adviser regulation and compliance best practices, and adherence to nationally recognized professional standards and ethical leadership.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Mary E. Keegan. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Waldron Private Wealth is required to disclose information regarding any arrangement under which Mary E. Keegan receives an economic benefit from someone other than a client for providing investment advisory services. Waldron Private Wealth has no information to disclose in relation to this Item.

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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Nicholas K. Koury

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: August 17, 2023

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Nicholas K. Koury (CRD # 7254047) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Nicholas K. Koury is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Nicholas K. Koury | Born 1996

Post-Secondary Education

Campbell University | B.B.A, Trust and Wealth Management | 2020

Campbell University | M.S., Business Administration | 2020

Recent Business Background

Waldron Private Wealth, LLC | Wealth Planning Analyst | May 2022 – Present

Waldron Private Wealth, LLC | Wealth Planning Associate | July 2020 – May 2022

Waldron Private Wealth, LLC | Wealth Planning Intern | May 2019 – July 2019 and May 2018 – August 2018

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Koury is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial

advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Nicholas K. Koury. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Koury's annual compensation is based, in part, on the number of clients that Mr. Koury introduces to the Registrant. Accordingly, Mr. Koury 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Andrew D. Kuzemchak

1307 New York Ave NW, 5th Floor

Washington, DC 20005

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: August 26, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Andrew D. Kuzemchak (CRD # 7569052) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Andrew D. Kuzemchak is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Andrew D. Kuzemchak | Born 2001

Post-Secondary Education

The Pennsylvania State University | B.S., Economics | 2023

Recent Business Background

Waldron Private Wealth, LLC | Investment Analyst | December 2024 – Present

Waldron Private Wealth, LLC | Investment Associate | June 2023 – December 2024

The Pennsylvania State University | Student | September 2019 – May 2023

Professional Designations

Chartered Financial Analyst®

Mr. Kuzemchak has been a CFA® Charterholder since 2026. 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 200,000 CFA® Charterholders working in over 170 countries and regions. To earn the CFA® charter, candidates must: (1) pass three sequential examinations; (2) have at least 4,000 hours of relevant work experience over 36+ months; (3) be a member of the CFA Institute and have the required professional references; 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® Charterholders 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 requiring extensive study, where 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 proficiency in 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.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Andrew D. Kuzemchak. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Kuzemchak's annual compensation is based, in part, on the number of clients that Mr. Kuzemchak introduces to the Registrant. Accordingly, Mr. Kuzemchak 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Sean B. McGuigan

989 Old Eagle School Road, Suite 810

Wayne, PA 19087

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: November 24, 2025

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Sean B. McGuigan (CRD # 8179749) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Sean B. McGuigan is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Sean B. McGuigan | Born 2003

Post-Secondary Education

University of Pittsburgh | B.S.B.A., Finance and Supply Chain Management | 2025

Recent Business Background

Waldron Private Wealth, LLC | Investment Associate | April 2025 – Present

Waldron Private Wealth, LLC | Investment Intern | January 2024 – April 2025

University of Pittsburgh | Student | August 2021 – April 2025

Aflac | Sales Advisor Intern | May 2023 – August 2023

California Pizza Kitchen | Busser/Server | May 2020 – August 2022

John Paul II High School | Student | August 2017 – August 2021

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Sean B. McGuigan. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Mr. McGuigan's annual compensation is based, in part, on the number of clients that Mr. McGuigan introduces to the Registrant. Accordingly, Mr. McGuigan 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Spencer O. McKee

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: August 6, 2024

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Spencer O. McKee (CRD # 7775611) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Spencer O. McKee is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Spencer O. McKee | Born 1999

Post-Secondary Education

Saint Vincent College | B.S., Finance and Mathematics, Minor in Economics | 2022

Recent Business Background

Waldron Private Wealth, LLC | Wealth Planning Analyst | July 2024 – Present

Waldron Private Wealth, LLC | Wealth Planning Associate | June 2022 – July 2024

Somerset Trust Company | Bank Teller | May 2021 – December 2021

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. McKee is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP

Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Spencer O. McKee. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Mr. McKee's annual compensation is based, in part, on the number of clients that Mr. McKee introduces to the Registrant. Accordingly, Mr. McKee 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Brent Meilinger

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: September 2, 2025

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Brent Meilinger (CRD # 7675550) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Brent Meilinger | Born 2000

Post-Secondary Education

Duquesne University | B.S., Finance and International Business, Minor in Spanish | 2022

Recent Business Background

Waldron Private Wealth, LLC | Senior Investment Analyst | August 2025 – Present

Waldron Private Wealth, LLC | Investment Analyst | March 2024 – August 2025

Waldron Private Wealth, LLC | Investment Associate | June 2022 – March 2024

Waldron Private Wealth, LLC | Investment Intern | September 2021 – June 2022

Waldron Private Wealth, LLC | Business Development Intern | December 2019 – August 2021

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Meilinger is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

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- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Brent Meilinger. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Meilinger's annual compensation is based, in part, on the number of clients that Mr. Meilinger introduces to the Registrant. Accordingly, Mr. Meilinger 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Aidan Mills

989 Old Eagle School Road, Suite 810

Wayne, PA 19087

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: April 2, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Aidan Mills (CRD # 7958986) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Aidan Mills | Born 2002

Post-Secondary Education

Westmoreland County Community College | AAS, Business Finance | 2022

La Roche University | BS, Finance and Management | 2024

Recent Business Background

Waldron Private Wealth, LLC | Wealth Planning Analyst | July 2025 – Present

Waldron Private Wealth, LLC | Wealth Planning Associate | July 2024 – July 2025

Waldron Private Wealth, LLC | Wealth Planning Intern | January 2023 – July 2024

La Roche University | Student | August 2022 – May 2024

Excela Health Latrobe Hospital | Environmental Services | February 2020 – August 2022

Westmoreland County Community College | Student | August 2020 – May 2022

Greater Latrobe School District | Student Janitor | January 2018 – August 2018

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Mills is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Aidan Mills. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Mills's annual compensation is based, in part, on the number of clients that Mr. Mills introduces to the Registrant. Accordingly, Mr. Mills 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Tyler Mock

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: February 20, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Tyler Mock (CRD # 8213495) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Tyler Mock | Born 2000

Post-Secondary Education

University of Pittsburgh | B.S.B.A., Accounting | 2023

Recent Business Background

Waldron Private Wealth, LLC | Investment Analyst | February 2026 – Present

Waldron Private Wealth, LLC | Wealth Planning Analyst | January 2026 – February 2026

Heritage Wealth Advisors | Wealth Planning Associate | October 2024 – January 2026

Wesco Distribution | Financial Analyst | June 2023 – October 2024

Crawford Ellenbogen, LLC | Accounting Intern | June 2021 – June 2023

University of Pittsburgh | Student | August 2020 – April 2023

Sam's Club | Parking Lot Attendant | September 2018 – June 2021

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Tyler Mock. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Mock's annual compensation is based, in part, on the number of clients that Mr. Mock introduces to the Registrant. Accordingly, Mr. Mock 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Kaleigh A. Price

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: April 15, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Kaleigh A. Price (CRD # 6085740) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Kaleigh A. Price. is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kaleigh A. Price | Born 1996

Post-Secondary Education

Temple University | B.B.A., Finance | 2018

Recent Business Background

Waldron Private Wealth, LLC | Strategist – Wealth Planning | October 2024 – Present

Waldron Private Wealth, LLC | Wealth Planning Analyst | December 2022 – October 2024

Waldron Private Wealth, LLC | Wealth Planning Associate | July 2022 – December 2022

Lincoln Investment LLC | Registered Representative | December 2015 – July 2022

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Ms. Price is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, she may refer to herself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and she may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial

advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Chartered Special Needs Consultant®

Ms. Price is certified as a Chartered Special Needs Consultant® (ChSNC®). There are no prerequisites for you to begin the ChSNC® program other than a high school diploma or the equivalent, but before you can use the ChSNC® designation, you must:

- Successfully complete all three courses
- Agree to comply with THE AMERICAN COLLEGE CODE OF ETHICS AND PROCEDURES
- Have at least five years of professional experience in financial services or the practice of law (with a focus on income tax and/or estate planning), OR
- Have four years of relevant professional financial services experience and an undergraduate degree from a regionally accredited institution.

Participation in the annual Professional Recertification Program (PRP) is required to maintain the designation. The program is not intended to be a stand-alone designation, but rather a specialization to complement a primary financial planning degree or designation, such as MSFS, MS in financial planning, ChFC, CFP, CPA, or JD/LLM. The program and designation are viewed by the College as an area of specialization within a practitioner's broader based financial planning education.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Kaleigh A. Price. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Kaleigh A. Price is actively engaged.

Licensed Insurance Agent. Ms. Price, 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. Price to effect insurance transactions on a commission basis. Conflict of Interest: The recommendation by Ms. Price that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Ms. Price. Clients are reminded that they may purchase insurance products recommended by the Registrant through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.

ITEM 5. ADDITIONAL COMPENSATION

Ms. Price's annual compensation is based, in part, on the number of clients that Ms. Price introduces to the Registrant. Accordingly, Ms. Price 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

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WALDRON
Private Wealth

ITEM 1. COVER PAGE

Wade Rashilla

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: May 6, 2025

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Wade Rashilla (CRD # 7626544) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Wade Rashilla | Born 1999

Post-Secondary Education

Westmoreland County Community College | A.A., General Studies | 2018

Saint Vincent College | B.S., Finance and Mathematics, Minor in Accounting and Economics | 2022

Recent Business Background

Waldron Private Wealth, LLC | Senior Analyst – Investments | December 2024 – Present

Waldron Private Wealth, LLC | Investment Analyst | June 2023 – December 2024

Waldron Private Wealth, LLC | Investment Associate | July 2022 – June 2023

Waldron Private Wealth, LLC | Investment Intern | January 2022 – July 2022

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Rashilla is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

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- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Chartered Financial Analyst®

Mr. Rashilla has been a CFA® Charterholder since 2024. 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 200,000 CFA® Charterholders working in over 170 countries and regions. To earn the CFA® charter, candidates must: (1) pass three sequential examinations; (2) have at least 4,000 hours of relevant work experience over 36+ months; (3) be a member of the CFA Institute and have the required professional references; 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® Charterholders 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 requiring extensive study, where 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 proficiency in 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.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Wade Rashilla. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Rashilla's annual compensation is based, in part, on the number of clients that Mr. Rashilla introduces to the Registrant. Accordingly, Mr. Rashilla 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
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ITEM 1. COVER PAGE

William Brett Rees

1307 New York Ave NW, 5th Floor

Washington, DC 20005

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: October 10, 2024

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about William Brett Rees (CRD # 4619333) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about William Brett Rees is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

William Brett Rees | Born 1963

Post-Secondary Education

The University of Texas at Austin | B.A., Economics | 1986

Recent Business Background

Waldron Private Wealth, LLC | Managing Director – Wealth Consultant | March 2024 – Present

Northern Trust Securities | Senior Vice President | September 1997 – June 2023

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of William Brett Rees. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Rees's annual compensation is based, in part, on the number of clients that Mr. Rees introduces to the Registrant. Accordingly, Mr. Rees 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

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WALDRON
Private Wealth

ITEM 1. COVER PAGE

Joshua Rennert

177 N. Main Street, Suite 200

Plymouth, MI 48170

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: July 9, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Joshua Rennert (CRD # 5133553) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Joshua Rennert | Born 1982

Post-Secondary Education

Northwood University | B.B.A. Business Management; Entertainment, Sport, and Promotion Mgt. | 2007

Recent Business Background

Waldron Private Wealth, LLC | Wealth Advisor | April 2026 – Present

OSAIC | Investment Advisor Representative | April 2024 – April 2026

Sequoia Financial Advisors LLC | Investment Advisor Representative | September 2021 – April 2024

Sequoia Financial Group LLC | Senior Vice President, Financial Advisor | September 2021 – April 2024

Comerica Bank | Senior Vice President, Senior Wealth Advisor | June 2019 – September 2021

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Joshua Rennert. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Rennert's annual compensation is based, in part, on the number of clients that Mr. Rennert introduces to the Registrant. Accordingly, Mr. Rennert 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.

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WALDRON
Private Wealth

ITEM 1. COVER PAGE

Kevin M. Searfoss

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: August 17, 2023

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Kevin M. Searfoss (CRD # 2368306) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kevin M. Searfoss | Born 1970

Post-Secondary Education

Geneva College | B.S., Business Administration | 1992

Recent Business Background

Waldron Private Wealth, LLC | Senior Wealth Strategist | November 2022 – Present

Waldron Private Wealth, LLC | Senior Wealth Advisor | January 2018 – November 2022

Waldron Private Wealth, LLC | Wealth Counselor | January 2002 – January 2019

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Searfoss is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP

Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Certified Divorce Financial Analyst®

Mr. Searfoss has held the designation of Certified Divorce Financial Analyst® (CDFA®) since 2012. The Certified Divorce Financial Analyst® (CDFA®) designation is issued by The Institute for Divorce Financial Analysts (IDFATM), which is a national organization dedicated to the certification, education, and promotion of the use of financial professionals in the divorce arena.

Founded in 1993, IDFATM provides specialized training to accounting, financial, and legal professionals in the field of pre-divorce financial planning. Over the years, IDFATM has certified more than 5,000 professionals in the U.S. and Canada as Certified Divorce Financial Analysts® (CDFAs®). The CDFA® designation is available to individuals who have a minimum of three years' experience as a financial professional, accountant, or matrimonial lawyer. To acquire the designation, a candidate must successfully pass all exams and be in good standing with their broker dealer (if applicable) and the FINRA/SEC or other licensing or regulatory agency.

To earn the designation, the participant must complete a series of self-study course modules and pass an examination for each module. The American module topics are:

- Financial and legal issues of divorce
- Advanced financial issues of divorce
- Tax issues of divorce
- Working as a CDFA: case studies

Behavioral Financial Advisor

Mr. Searfoss has held the designation of Behavioral Financial Advisor (BFA) since 2019. The BFA designation was created by Kaplan Financial Education. The program instructs on how to mentor and coach clients in their financial decisions, transition to advice-based fees, and offer a holistic approach to strengthen the advisor-client relationship. The program uses an integrated approach founded on self-awareness, we demonstrate how traditional finance practices are influenced by psychology and neuroscience. The Behavioral Financial Advice program improves emotional competencies and decision-making behavior to increase the usage of the financial plan for you and your clients. The BFA program requires the completion of 2 courses, related to behavioral finance, and the passing of a certification exam. Twenty hours of continuing education is required every two years.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Kevin M. Searfoss. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Kevin Searfoss is actively engaged.

Licensed Insurance Agent. Mr. Searfoss, 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. Searfoss to effect insurance transactions on a commission basis. Conflict of Interest: The recommendation by Mr. Searfoss that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Searfoss. Clients are reminded that they may purchase insurance products recommended by the Registrant through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.

Trustee. On a limited basis, Mr. Searfoss serves as trustee for clients whom the Registrant provides investment advisory services. Conflict of Interest: A conflict of interest occurs when Mr. Searfoss personal or business interests potentially conflict with their responsibilities to the trust beneficiaries. Clients are reminded that they are under no obligation to use the Registrant or its affiliates for trustee services. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Searfoss's annual compensation is based, in part, on the number of clients that Mr. Searfoss introduces to the Registrant. Accordingly, Mr. Searfoss 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Jacob R. Smith

177 N. Main Street, Suite 200

Plymouth, MI 48170

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: July 9, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Jacob R. Smith (CRD # 8094766) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Jacob R. Smith is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jacob R. Smith | Born 2000

Post-Secondary Education

Grove City College | B.S., Finance | 2023

Recent Business Background

Waldron Private Wealth, LLC | Wealth Planning Analyst | July 2026 – Present

Waldron Private Wealth, LLC | Wealth Planning Associate | February 2025 – July 2026

Waldron Private Wealth, LLC | Client Service Associate | June 2023 – January 2025

Grove City College | Student | August 2019 – May 2023

McKinley Carter Wealth Services | Intern | May 2022 – January 2023

Seneca Valley High School | Student | August 2015 – July 2019

Seneca Valley Middle School | Student | August 2013 – July 2015

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Smith is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
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- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
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- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Jacob R. Smith. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Smith's annual compensation is based, in part, on the number of clients that Mr. Smith introduces to the Registrant. Accordingly, Mr. Smith 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

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WALDRON
Private Wealth

ITEM 1. COVER PAGE

Andrew W. Steigerwald

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: March 9, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Andrew W. Steigerwald (CRD # 8099265) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Andrew W. Steigerwald is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Andrew W. Steigerwald | Born 2004

Post-Secondary Education

Robert Morris University | B.S.B.A., Finance and Financial Planning | 2025

Recent Business Background

Waldron Private Wealth, LLC | Wealth Planning Analyst | March 2026 – Present

Waldron Private Wealth, LLC | Wealth Planning Associate | May 2025 – March 2026

Waldron Private Wealth, LLC | Wealth Planning Intern | June 2023 – May 2025

Robert Morris University | Student | August 2022 – May 2025

Soergel Orchards | Student & Produce Manager | August 2019 – September 2023

North Allegheny School District | Student | September 2014 – June 2022

Soergel Orchards | Produce Worker/Hand | February 2019 – August 2019

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Steigerwald is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
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- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Andrew W. Steigerwald. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Andrew W. Steigerwald is actively engaged.

Licensed Insurance Agent. Mr. Steigerwald, 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. Steigerwald to effect insurance transactions on a commission basis. Conflict of Interest: The recommendation by Mr. Steigerwald that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Steigerwald. Clients are reminded that they may purchase insurance products recommended by the Registrant through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Steigerwald's annual compensation is based, in part, on the number of clients that Mr. Steigerwald introduces to the Registrant. Accordingly, Mr. Steigerwald 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

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WALDRON
Private Wealth

ITEM 1. COVER PAGE

Nicholas J. Urban

177 N. Main Street, Suite 200

Plymouth, MI 48170

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: July 22, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Nicholas J. Urban (CRD # 6795132) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Nicholas J. Urban is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Nicholas J. Urban | Born 1997

Post-Secondary Education

Central Michigan University | B.S.B.A., Personal Financial Planning | 2019

Recent Business Background

Waldron Private Wealth, LLC | Wealth Planning Strategist | September 2025 – Present

Waldron Private Wealth, LLC | Senior Analyst – Wealth Planning | December 2024 – September 2025

Waldron Private Wealth, LLC | Wealth Planning Analyst | February 2023 – December 2024

Advanced Wealth Strategies | Associate Advisor | August 2019 – February 2023

Kulhavi Wealth Management | Advisory Intern | May 2018 – August 2018

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Urban is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Registered Financial Consultant

Mr. Urban is certified as Registered Financial Consultant (RFC®) by the International Association of Registered Financial Consultants (IARFC). Therefore, he may use the IARFC's designation and certification mark. The RFC® certification is voluntary. You may find more information about the RCA® certification at https://www.iarfc.org/professionals/rfc .

The Registered Financial Consultant (RFC®) is a designation awarded by the IARFC to financial consultants who meet certain standards of education, experience, and ethics. To become a RFC®, an individual must fulfill the following requirements:

Education – One of the following is needed to satisfy the education requirement:

- One of the following professional designations: AAMS®, CFA, CFP®, ChFC®, CLU®, CPA, EA, LUTCF®.
- A Series 65 Securities license or one of the following combinations: Series 6 & 63, Series 6 & 66, Series 7 & 63, Series 7 & 66.
- Life Insurance license.
- A Bachelors' or advanced degree in Business, Finance, Economics, or a related field.
- An applicant can also meet the education requirement by completing the entire course requirements for one of the designations listed above.
- Licensing – Required licenses necessary for their mode of practice.
- Conduct – Sound record of business integrity with no suspension or revocation of any professional designations or licenses. Must be in good standing with all licensing bodies and organizations.
- Experience – The RFC® is available to financial professionals who have at least three (3) years of experience in the financial services industry.
- Ethics – Subscribe and adhere to the IARFC Code of Ethics.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the RFC® designation:

- Ethics – Subscribe and adhere to the IARFC Code of Ethics.
- Continuing Education – All RFC® designated members must agree to devote a minimum of 40 units every two years of professional Continuing Education in the field of personal finance and professional practice management. Four units every two years must be devoted to ethics.
- Re-Certification – Annually provide assurance of continued compliance and operation.

Certified Trust and Fiduciary Advisor

Mr. Urban also holds the professional designation of Certified Trust and Fiduciary Advisor ("CTFA"). The CTFA is a professional certification mark granted by the American Bankers Association Institute of Certified Brokers ("IBC"). The CTFA certification is voluntary. No federal or state law or regulation requires financial planners or wealth managers to hold the CTFA certification. You may find more information about the CTFA certification at www.aba.com.

To attain the right to use the CTFA marks, an individual must satisfactorily fulfill the following prerequisites: (i) a minimum of three years of experience in wealth management as well as completion of one of the five ICB approved wealth management training programs, five years of experience in wealth management and a bachelor's degree, or 10 years of experience in wealth management; (ii) one letter of recommendation is required from a manager attesting to the candidate's qualifications for certification, including his or her wealth management experience and ethical character; (iii) each candidate must sign ICB's Professional Code of Ethics statement; (iv) candidates must complete and submit an application and must meet all of the eligibility requirements at the time the application is

submitted; and (v) once the above requirements have been met, candidates must pass 3 the comprehensive CTFA certification exam which measures the candidate's knowledge in the areas of fiduciary and trust activities, financial planning, tax law and planning, investment management, and ethics. To maintain the right to continue to use the CTFA marks, individuals who become certified must complete 45 hours of continuing education every three years, with a minimum of six hours in each of the five knowledge areas. In addition, certified individuals are required to complete three continuing education credits in ethics.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Nicholas J. Urban. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Nicholas Urban is actively engaged.

Licensed Insurance Agent. Mr. Urban, 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. Urban to effect insurance transactions on a commission basis. Conflict of Interest: The recommendation by Mr. Urban that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Urban. Clients are reminded that they may purchase insurance products recommended by the Registrant through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.

Board and Investment Committee Member. Mr. Urban serves on the Board and Investment Committee for the Mosaic Youth Theatre of Detroit.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Urban's annual compensation is based, in part, on the number of clients that Mr. Urban introduces to the Registrant. Accordingly, Mr. Urban 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.

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WALDRON
Private Wealth

ITEM 1. COVER PAGE

Jacob D. Vranish

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: July 30, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Jacob D. Vranish (CRD # 7875209) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Jacob D. Vranish is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jacob D. Vranish | Born 1987

Post-Secondary Education

California University of PA | B.S., Business Administration – Global Business | 2021

California University of PA | B.S., Marketing | 2021

Recent Business Background

Waldron Private Wealth, LLC | Analyst – Wealth Planning | February 2024 – Present

Waldron Private Wealth, LLC | Client Service Specialist | August 2019 – January 2024

UPS | Package Delivery Driver | May 2018 – August 2019

First National Bank of PA | Call Center Supervisor | November 2016 – May 2018

BNY Mellon | Sr. Client Service Representative | January 2012 – November 2016

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Vranish is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Jacob D. Vranish. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Jacob D. Vranish is actively engaged.

Licensed Insurance Agent. Mr. Vranish, 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. Vranish to purchase insurance products on a commission basis. Conflict of Interest: The recommendation by Mr. Vranish 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. Vranish. Clients are reminded that they may purchase insurance products recommended by Mr. Vranish through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Vranish's annual compensation is based, in part, on the number of clients that Mr. Vranish introduces to the Registrant. Accordingly, Mr. Vranish 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Bryan Waldron

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: April 2, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Bryan Waldron (CRD # 6634678) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Bryan Waldron | Born 1993

Post-Secondary Education

Ohio University | B.A., Finance | 2015

Recent Business Background

Waldron Private Wealth, LLC | Director – Wealth Planning | September 2022 - Present

Waldron Private Wealth, LLC | Senior Analyst – Wealth Planning | May 2018 – September 2022

Waldron Private Wealth, LLC | Planning Analyst | July 2016 – May 2018

Waldron Private Wealth, LLC | Investment Analyst | June 2015 – June 2016

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Mr. Waldron is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

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- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial

advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Bryan Waldron. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Bryan Waldron is actively engaged.

Licensed Insurance Agent. Mr. Waldron, 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. Waldron to effect insurance transactions on a commission basis. Conflict of Interest: The recommendation by Mr. Waldron that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Waldron. Clients are reminded that they may purchase insurance products recommended by the Registrant through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.

Trustee. On a limited basis, Mr. Waldron serves as trustee for clients whom the Registrant provides investment advisory services. Conflict of Interest: A conflict of interest occurs when Mr. Waldron's personal or business interests potentially conflict with their responsibilities to the trust beneficiaries. Clients are reminded that they are under no obligation to use the Registrant or its affiliates for trustee services. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Waldron's annual compensation is based, in part, on the number of clients that Mr. Waldron introduces to the Registrant. Accordingly, Mr. Waldron 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Michael Waldron

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: April 2, 2025

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Michael Waldron (CRD # 6740376) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael Waldron | Born 1995

Post-Secondary Education

Ohio University | B.A., Finance | 2017

Recent Business Background

Waldron Private Wealth, LLC | Wealth Planning Sr. Analyst | December 2022 – Present

Waldron Private Wealth, LLC | Wealth Planning Analyst | March 2020 – December 2022

Waldron Private Wealth, LLC | Wealth Planning and Investment Associate | March 2017 – March 2020

Professional Designations

Certified Trust and Financial Advisor

Mr. Waldron holds the designation of Certified Trust and Financial Advisor (CTFA). The CTFA designation identifies individuals who have completed certain requirements mandated by the Institute of Certified Bankers (ICB). Candidates must pass a comprehensive exam and meet the following requirements: 1) must have a minimum of three (3) years' experience in wealth management and complete an ICB wealth management-training program or have five (5) years' experience in wealth management and a bachelor's degree or have at least ten (10) years' experience in wealth management; 2) must provide the ICB with a letter of recommendation; 3) must agree to ICB's Professional Code of Ethics; 4) must pay an annual fee and 5) must complete forty five (45) continuing education credits every three (3) years.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Michael Waldron. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Michael Waldron is actively engaged.

Licensed Insurance Agent. Mr. Waldron, 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. Waldron to effect insurance transactions on a commission basis. Conflict of Interest: The recommendation by Mr. Waldron that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend investment products based on commissions received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Waldron. Clients are reminded that they may purchase insurance products recommended by the Registrant through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, 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. Waldron's annual compensation is based, in part, on the number of clients that Mr. Waldron introduces to the Registrant. Accordingly, Mr. Waldron 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, Mary Keegan, 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 promoter 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 Ms. Keegan at (412) 221-1005.

WALDRON
Private Wealth

ITEM 1. COVER PAGE

Shea A. Waldron

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: May 6, 2025

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Shea A. Waldron (CRD # 6634663) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

Additional information about Shea A. Waldron is available on the SEC's website at www.adviserinfo.sec.gov.

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Shea A. Waldron | Born 1991

Post-Secondary Education

Penn State University | B.S., Accounting | 2015

Recent Business Background

Waldron Private Wealth, LLC | Strategist – Family Office Services | December 2021– Present

Waldron Private Wealth, LLC | Analyst – Wealth Planning | January 2020 – December 2021

Waldron Private Wealth, LLC | Associate – Wealth Planning | May 2015 – January 2020

Professional Designations

Chartered Advisor in Philanthropy®

Mr. Waldron holds the designation of Chartered Advisor in Philanthropy® (CAP®), issued by The American College of Financial Services. The CAP® is a graduate-level professional designation focused on philanthropic planning and charitable giving strategies. It is designed for financial and nonprofit professionals who advise clients on integrating philanthropic goals with their overall financial, estate, and legacy planning. To earn the CAP® designation, candidates must: (1) complete three required courses covering family wealth planning, charitable giving strategies, and gift planning in a nonprofit context; (2) pass a final exam for each course; (3) have at least three years of full-time, relevant business experience, (4) agree to comply with The American College Code of Ethics and Procedures, (5) Participate in an annual Professional Recertification Program to maintain the designation. The curriculum covers advanced tax strategies, estate planning, business exit planning, legacy planning, and collaboration with nonprofits and high-capacity donors. The program is delivered online in a self-study format and typically takes less than 12 months to complete.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Shea A. Waldron. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

ITEM 5. ADDITIONAL COMPENSATION

Mr. Waldron's annual compensation is based, in part, on the number of clients that Mr. Waldron introduces to the Registrant. Accordingly, Mr. Waldron 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

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WALDRON
Private Wealth

ITEM 1. COVER PAGE

Lindsay Wilcox

Waldron Private Wealth, LLC

ADV Part 2B, Brochure Supplement

Dated: April 2, 2026

Contact: Mary Keegan, Chief Compliance Officer

44 Abele Road, Suite 400

Bridgeville, Pennsylvania 15017

www.waldronprivatewealth.com

This brochure supplement provides information about Lindsay Wilcox (CRD # 7179651) that supplements the Waldron Private Wealth, LLC ("Waldron Private Wealth") brochure. You should have received a copy of that brochure. Please contact Mary Keegan, Chief Compliance Officer, if you did not receive Waldron Private Wealth's brochure or if you have any questions about the contents of this supplement.

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

WALDRON
Private Wealth

ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Lindsay Wilcox | Born 1987

Post-Secondary Education

Saint Vincent College | B.S., Marketing | 2010

University of Pittsburgh | M.B.A. | 2014

Recent Business Background

Waldron Private Wealth, LLC | Director – Wealth Planning | October 2023 – Present

Waldron Private Wealth, LLC | Strategist – Wealth Planning | October 2022 – October 2023

Waldron Private Wealth, LLC | Senior Planning Analyst | June 2021 – October 2022

Wells Fargo Clearing Services, LLC | Financial Advisor | May 2020 – May 2021

UBS Financial Services Inc. | Senior Wealth Strategy Associate | February 2016 – June 2017

Pure Barre Peters Township | Owner | November 2016 – January 2024

Professional Designations

CERTIFIED FINANCIAL PLANNER® Professional

Ms. Wilcox is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, she may refer to herself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and she may use these and CFP Board's other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

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- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

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- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Chartered Financial Consultant
Ms. Wilcox has held the designation of Chartered Financial Consultant (ChFC®) since 2022. The ChFC® designation is awarded by The American College, an accredited private educational institution that offers both undergraduate and graduate training programs. Prerequisites include high school education and three years of full-time business experience within the five years preceding the awarding of the designation. Average study time to earn the ChFC® exceeds 450 hours, to complete the 8 required college-level courses and pass the final exam for each course. Required courses cover topics, including retirement and estate planning; insurance planning; financial process and environment, income tax planning; employee benefits planning; asset protection planning and estate tax, transfer tax, and gift tax planning; and applications of comprehensive financial planning and consulting. Certification requires 30 CE credits every two years. ChFC® charterholders are held to a fiduciary standard and agree to comply with The American College code of ethics and procedures.

Certified Trust and Financial Advisor
Ms. Wilcox holds the designation of Certified Trust and Financial Advisor (CTFA). The CTFA designation identifies individuals who have completed certain requirements mandated by the Institute of Certified Bankers (ICB). Candidates must pass a comprehensive exam and meet the following requirements: 1) must have a minimum of three (3) years' experience in wealth management and complete an ICB wealth management-training program or have five (5) years' experience in wealth management and a bachelor's degree or have at least ten (10) years' experience in wealth management; 2) must provide the ICB with a letter of recommendation; 3) must agree to ICB's Professional Code of Ethics; 4) must pay an annual fee and 5) must complete forty five (45) continuing education credits every three (3) years.

For additional information about credentials, please refer directly to the website of the issuing organization.

ITEM 3. DISCIPLINARY INFORMATION

Waldron Private Wealth is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Lindsay Wilcox. Waldron Private Wealth has no information to disclose in relation to this Item.

ITEM 4. OTHER BUSINESS ACTIVITIES

Waldron Private Wealth is required to disclose information regarding (1) any investment-related business or occupation and (2) any non-investment related business or occupation for compensation in which Lindsay Wilcox is actively engaged.

Licensed Insurance Agent. Ms. Wilcox, 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. Wilcox to purchase insurance products on a commission basis. Conflict of Interest: The recommendation by Ms. Wilcox 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. Wilcox. Clients are reminded that they may purchase insurance products recommended by Ms. Wilcox through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, Mary Keegan, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.

ITEM 5. ADDITIONAL COMPENSATION

Ms. Wilcox's annual compensation is based, in part, on the number of clients that Ms. Wilcox introduces to the Registrant. Accordingly, Ms. Wilcox 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

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