

*This brochure supplement provides information about Christopher Charles Drouin that supplements the Beyond Wealth Management Group, LLC brochure. You should have received a copy of that brochure. Please contact Christopher Charles Drouin if you did not receive Beyond Wealth Management Group, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Christopher Charles Drouin is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

# **Beyond Wealth Management Group, LLC**

## **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**Christopher Charles Drouin**

Personal CRD Number: 4541093

Investment Adviser Representative

Beyond Wealth Management Group, LLC  
101 Main St Rear Building  
New Paltz, NY 12561  
(845) 750-6213  
[cdrouin@beyondwm.com](mailto:cdrouin@beyondwm.com)

UPDATED: 10/09/2018

## Item 2: Educational Background and Business Experience

**Name:** Christopher Charles Drouin      **Born:** 1974

### **Educational Background and Professional Designations:**

#### **Education:**

BA Psychology, State University of New York at New Paltz - 1996

#### **Business Background:**

02/2017 - Present	Managing Member & Chief Compliance Officer Beyond Wealth Management, LLC
02/2002 - 02/2018	Financial Planner/ Advisor & Insurance Agent Mutual of Omaha

## Item 3: Disciplinary Information

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

## Item 4: Other Business Activities

Christopher Charles Drouin is a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission or other compensation and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. Beyond Wealth Management Group, LLC always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients always have the right to decide whether or not to utilize the services of any Beyond Wealth Management Group, LLC representative in such individual's outside capacities.

Christopher Charles Drouin is a Managing Member at Beyond Risk Management Group, LLC an Insurance Agency, located at 101 Main St, PO Box 324. He also acts as President/CEO. Business started on March 22, 2018. He devotes 5 hours during and outside trading hours. The expected percentage of his total yearly compensation is 5% that has been derived from the business. From time to time, he may offer clients advice or products from those activities and clients should be aware that these services may involve a conflict of interest. Beyond Risk Management Group, LLC always acts in the best interest of the client and clients always have the right to decide whether or not to utilize the services of any representative of Beyond Risk Management Group, LLC in such individual's outside capacities.

### **Item 5: Additional Compensation**

Christopher Charles Drouin does not receive any economic benefit from any person, company, or organization, other than Beyond Wealth Management Group, LLC in exchange for providing clients advisory services through Beyond Wealth Management Group, LLC.

### **Item 6: Supervision**

As the Chief Compliance Officer of Beyond Wealth Management Group, LLC, Christopher Charles Drouin supervises all activities of the firm. Christopher Charles Drouin's contact information is on the cover page of this disclosure document. Christopher Charles Drouin adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

*This brochure supplement provides information about Aidan Alexander Klein that supplements the Beyond Wealth Management Group, LLC brochure. You should have received a copy of that brochure. Please contact Aidan Alexander Klein if you did not receive Beyond Wealth Management Group, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Aidan Alexander Klein is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

# **Beyond Wealth Management Group, LLC**

## **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**Aidan Alexander Klein**

Personal CRD Number: 7334231

Investment Adviser Representative

Beyond Wealth Management Group, LLC  
101 Main Street Rear Building  
New Paltz, NY 12561  
(845) 750-6213  
[cdrouin@beyondwm.com](mailto:cdrouin@beyondwm.com)

UPDATED: 01/29/2021

## Item 2: Educational Background and Business Experience

**Name:** Aidan Alexander Klein

**Born:** 1997

### Educational Background and Professional Designations:

#### Education:

Bachelors Finance, State University of New York at New Paltz - 2019

#### Business Background:

01/2021 - Present	Investment Adviser Representative Beyond Wealth Management Group, LLC
01/2018 - Present	Planning Assistant Beyond Wealth Management Group LLC
01/2011 - 05/2015	NA Student

## Item 3: Disciplinary Information

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

## Item 4: Other Business Activities

Aidan Alexander Klein is not engaged in any investment-related business or occupation (other than this advisory firm).

### **Item 5: Additional Compensation**

Aidan Alexander Klein does not receive any economic benefit from any person, company, or organization, other than Beyond Wealth Management Group, LLC in exchange for providing clients advisory services through Beyond Wealth Management Group, LLC.

### **Item 6: Supervision**

As a representative of Beyond Wealth Management Group, LLC, Aidan Alexander Klein is supervised by Christopher C Drouin, the firm's Chief Compliance Officer. Christopher C Drouin is responsible for ensuring that Aidan Alexander Klein adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the Code of Ethics and compliance manual. The phone number for Christopher C Drouin is (845) 750-6213.

*This brochure supplement provides information about David W Cross that supplements the Beyond Wealth Management Group, LLC brochure. You should have received a copy of that brochure. Please contact David W Cross if you did not receive Beyond Wealth Management Group, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about David W Cross is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

# **Beyond Wealth Management Group, LLC**

## **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**David W Cross**

Personal CRD Number: 2946272  
Investment Adviser Representative

Beyond Wealth Management Group, LLC  
101 Main Street Rear Building  
New Paltz, NY 12561  
(845) 750-6213  
[dcross@beyondwm.com](mailto:dcross@beyondwm.com)

UPDATED: 01/08/2019

## Item 2: Educational Background and Business Experience

**Name:** David W Cross      **Born:** 1955

### Educational Background and Professional Designations:

#### Education:

BS Hotel Restaurant Administration, University Nevada at Las Vegas - 1980  
BS Business Admin, Ithaca College - 1978

### Business Background:

02/2019 - Present	Investment Adviser Representative Beyond Wealth Management Group, LLC
10/2018 - 01/2019	Chief Strategy Officer Beyond Wealth Management Group LLC
08/2015 - 10/2018	Retired Retired
07/2015 - 08/2015	District Sales Manager Mass Mutual
10/1997 - 07/2015	District Sales Manager Mutual of Mutual

## Item 3: Disciplinary Information

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



#### **Item 4: Other Business Activities**

David W Cross is not engaged in any investment-related business or occupation (other than this advisory firm).

#### **Item 5: Additional Compensation**

David W Cross does not receive any economic benefit from any person, company, or organization, other than Beyond Wealth Management Group, LLC in exchange for providing clients advisory services through Beyond Wealth Management Group, LLC.

#### **Item 6: Supervision**

As a representative of Beyond Wealth Management Group, LLC, David W Cross is supervised by Christopher C Drouin, the firm's Chief Compliance Officer. Christopher C Drouin is responsible for ensuring that David W Cross adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Christopher C Drouin is (845) 750-6213.