



**Summit Wealth  
Management, LLC**  
REGISTERED INVESTMENT ADVISORS

## Summit Wealth Management LLC - Form ADV Part 2B Individual Disclosure Brochure

*for*

**Megan Eberhart**

Personal CRD Number: 5945909

Investment Advisor Representative

This brochure supplement provides information about Megan Eberhart that supplements the Summit Wealth Management LLC brochure. You should have received a copy of that brochure. Please contact Richard Andrew Weidrick if you did not receive Summit Wealth Management LLC's brochure or if you have any questions about the contents of this supplement.

Summit Wealth Management LLC  
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Akron, OH 44333  
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megan@swm1.us

UPDATED: 3/2023

## Item 2: Educational Background and Business Experience

**Name:** Megan Eberhart      **Born:** 1989

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

#### **Education:**

MBA Finance, The Ohio State University - 2013  
BS Economics, Princeton University - 2011

#### **Designations:**

##### **CFA – Chartered Financial Analyst**

- To earn a CFA charter, you must have four years of qualified investment work experience, become a member of the CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in a six-hour exam. Level I is offered in June or December and Level II and III are administered in June. In passing these exams, candidates demonstrate their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.

#### **Business Background:**

05/2021- Present	Investment Adviser Representative Summit Wealth Management LLC
8/2018 – 04/2021	Portfolio Manager Johnson Investment Counsel
2/2016 – 08/2018	Manager GBQ Consulting
12/2014 – 01/2016	Vice President Point72 Asset Management, L.P.

### 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

Not Applicable.

### Item 5: Additional Compensation

Megan Eberhart does not receive any economic benefit from any person, company, or organization, other than Summit Wealth Management LLC in exchange for providing clients advisory services through Summit Wealth Management LLC.

### Item 6: Supervision

Richard Andrew Weidrick supervises all activities of the firm. Megan Eberhart adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.

### Item 7: Requirements For State Registered Advisors

*This disclosure is required by Ohio state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

- A. Megan Eberhart has NOT been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
  2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
- B. Megan Eberhart has NOT been the subject of a bankruptcy petition