

IMPACT PARTNERSHIP
WEALTH 

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**Form ADV Part 2B
Brochure Supplement
for
Lisa Kim**

Date of Brochure: October 19th, 2023

This brochure supplement provides information about Lisa Kim that supplements the Impact Partnership Wealth, LLC brochure. You should have received a copy of that brochure. Please contact Shawn Scholz at (866) 363-9595 or shawn.scholz@ae-wm.com if you did not receive Impact Partnership Wealth, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Lisa Kim is also available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Name: Lisa Kim (CRD#: 7800608)

Year of Birth: 1972

Education: University of Maryland Global Campus, Bachelor of Science in Psychology, 2006

Business
Background: Impact Partnership Wealth, LLC
Investment Adviser Representative, September 2023 - Present

New Perspective Financial Solutions
Advisor, March 2023 - Present

First Financial Security, IMO
Non-Captive Insurance Agent, June 2022 - Present

Baltimore Hire Power
Board Member, March 2020 - Present

Korean American Grocers Association
Board Member, January 2019 – Present

DocketMasters, LLC
Owner/Member, June 2002 - September 2022

Item 3 – Disciplinary Information

Ms. Kim has no civil, criminal, administrative or regulatory events to report. Additional information regarding Ms. Kim's registration as an investment adviser can be found by accessing the SEC's public disclosure website at <https://www.adviserinfo.sec.gov>.

Item 4 – Other Business Activities

Ms. Kim is an independent life insurance agent who is appointed with various insurance carriers. In this capacity as an independent life insurance agent of the insurance carriers, Ms. Kim can recommend / sell life insurance and fixed index annuity products. Ms. Kim utilizes the services of The Impact Partnership, LLC, an insurance marketing organization ("IMO"), to help him market his insurance related activities of recommending / selling life insurance and fixed index annuities.

Ms. Kim's life insurance and fixed index annuity clients can also be his clients of his registered investment adviser firm – the Impact Partnership Wealth, LLC. When Ms. Kim sells a life insurance product or fixed index annuity, Ms. Kim receives a commission from Ms. Kim's appointed insurance carrier and from The Impact Partnership, LLC. This type of activity can create an incentive to recommend life insurance and fixed indexed annuity products. Impact Partnership Wealth, LLC. addresses this activity with appropriate disclosures and supervisory procedures, which require all investment advisory recommendations to be in the best interest of our clients. Clients are under no obligation to purchase any life insurance of fixed annuity product from Ms. Kim; and thus, may purchase their life insurance or fixed annuity products through another insurance agent of their choosing.

Ms. Kim is the Non-Captive Insurance Agent of First Financial Security, IMO. Ms. Kim offers insurance and may offer those products to persons that are also clients of Impact Partnership Wealth, LLC. When he sells an insurance product, Ms. Kim receives a commission. This activity can create an incentive to recommend investment products based on the compensation received. Impact Partnership Wealth, LLC addresses this activity with disclosures and supervisory procedures, which require all investment advisory recommendations to be in the best interest of our clients. Clients are under no obligation to purchase any product or service and may do so through another insurance agent of their choosing. First Financial Security, IMO is not affiliated with Impact Partnership Wealth, LLC.

Ms. Kim is the Board Member of Baltimore Hire Power, a non-profit helping with job training and placement.

Ms. Kim is also the Board Member of Korean American Grocers Association of Maryland, a non-profit helping Korean owned businesses.

Item 5 – Additional Compensation

Ms. Kim may receive compensation or benefits through his affiliation with The Impact Partnership, LLC (and/or affiliated companies). Such additional compensation generally consists of cash bonus payments and reward trips based on insurance product sales performance. This activity can create an incentive to meet sales goals. Impact Partnership Wealth, LLC. addresses this activity with disclosures and supervisory procedures, which require all investment advisory recommendations to be in the best interests of our clients.

As an investment adviser representative of Impact Partnership Wealth, LLC, Ms. Kim can receive bonus payments from an insurance company for selling a targeted number of annuities during a specified period of time. Ms. Kim can also receive bonuses based on their overall assets under management during a specific period of time. These bonuses can include cash payments and/or qualifications for networking and business trips. These benefits are not a result of achieving sales quotas related to specific product lines. Impact Partnership Wealth, LLC addresses this activity with disclosures and supervisory procedures, which require all investment advisory recommendations to be in the best interest of our clients, following procedures and the firm's fiduciary obligation to each client.

Item 6 – Supervision

Impact Partnership Wealth, LLC. and its investment adviser representatives provide investment advisory services in accordance with Impact Partnership Wealth, LLC's Written Supervisory Procedures. Our Written Supervisory Procedures include provisions for systematic reviews of the investment recommendations made by our representatives and of the securities that are held in our clients' accounts. Our Chief Compliance Officer, Shawn Scholz, is primarily responsible for the implementation of our Written Supervisory Procedures and overseeing the activities of our investment adviser representatives. Clients may contact Mr. Scholz at (866) 363-9595 or shawn.scholz@ae-wm.com with any questions regarding our supervision or compliance practices.