

IMPACT PARTNERSHIP  
**WEALTH** 

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**Form ADV Part 2B  
Brochure Supplement  
for  
Vanessa Patterson**

**Date of Brochure: October 19, 2023**

This brochure supplement provides information about Vanessa Patterson 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](mailto: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 Vanessa Patterson is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 – Educational Background and Business Experience

Name: Vanessa Patterson (CRD#: 7702523)

Year of Birth: 1986

Education: Mount St. Mary's University, Bachelor of Science in Mathematics, 2008  
Georgetown University, Master of Science in Math & Statistics, 2009

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

New Perspective Financial Solutions  
Insurance Agent, December 2020 – Present

Berkshire Hathaway Home Services  
Real Estate Sales, October 2015 – Present

## Item 3 – Disciplinary Information

Ms. Patterson has no civil, criminal, administrative or regulatory events to report. Additional information regarding Ms. Patterson'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. Patterson is an independent life insurance agent who is appointed with various insurance carriers. In this capacity as independent life insurance agent of the insurance carriers, Ms. Patterson can recommend / sell life insurance and fixed index annuity products. Ms. Patterson utilizes the services of The Impact Partnership, LLC, an insurance marketing organization ("IMO"), to help him market her insurance related activities of recommending / selling life insurance and fixed index annuities.

Ms. Patterson's life insurance and fixed index annuity clients can also be clients of her registered investment adviser firm – the Impact Partnership Wealth, LLC. When Ms. Patterson sells a life insurance product or fixed index annuity, Ms. Patterson receives a commission from Ms. Patterson'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 or fixed annuity product from Ms. Patterson; and thus, may purchase their life insurance or fixed annuity products through another insurance agent of their choosing.

Ms. Patterson is an agent of New Perspective Financial Services. Ms. Patterson offers insurance and may offer those products to persons that are also clients of Impact Partnership Wealth, LLC. When she sells an insurance product, Ms. Patterson 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. New Perspective Financial Services is not affiliated with Impact Partnership Wealth, LLC.

### **Item 5 – Additional Compensation**

Ms. Patterson may receive compensation or benefits through her 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. Patterson can receive bonus payments from an insurance company for selling a targeted number of annuities during a specified period of time. Ms. Patterson 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](mailto:shawn.scholz@ae-wm.com) with any questions regarding our supervision or compliance practices.