## Item 1- Cover Page

# Advisory Brochure Part 2B


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**This Brochure Supplement provides information about Michael A. Piccoli ("Supervised Person") that supplements the Woodstock Wealth Management, Inc. Brochure. You should have received a copy of that Brochure. Please contact William J. Raike III, RIA Chief Compliance Officer, at (800) 279-4468 if you did not receive Woodstock Wealth Management, Inc.'s Brochure or if you have any questions about the contents of this supplement.**

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

## Item 2- Educational Background and Business Experience

Year of Birth
1979

Educational Background
Bachelor's Degree - Economics

Business Experience
Woodstock Wealth Management, Inc. – Investment Adviser Representative; West Palm Beach; Florida; 2/22 – Present*

*Conducts Advisory business under the DBA Shift Financial Group LLC and Shift Financial Planning LLC

Sole Proprietor – Insurance Agent for various carriers; West Palm Beach; Florida; 1/12 – Present

Park Avenue Securities – Registered Representative & Investment Adviser Representative; Tequesta; Florida; 12/08 – 2/22

## Item 3- Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

No information is applicable to this Item.

## Item 4- Other Business Activities

The Supervised Person is the owner of Shift Financial Group LLC and Shift Financial Planning LLC; these entities are used as DBAs for his relationship with Woodstock Wealth Management, Inc.

The Supervised Person is an insurance agent and sells non-securities insurance as a sole proprietor.

The Supervised Person is the Board-President for Cambridge at Abacoa HOA in Jupiter, Florida.

## Item 5- Additional Compensation

The Supervised Person does not receive economic benefits in the form of awards, bonuses and prizes from any person or entity for providing advisory services and investment advice to a client of Woodstock Wealth Management, Inc.

## Item 6 – Supervision

William J. Raike III, RIA Chief Compliance Officer, and any designee he may appoint are daily reviewing transactions in client accounts. A sample of accounts is monitored quarterly by the RIA Chief Compliance Officer. In such a review, the RIA Chief Compliance Officer is evaluating transaction history relative to the client's profile and the underlying agent's compliance with firm policies and fiduciary standards. Additional account reviews may be triggered by a specific client request; a customer complaint; or, as needed, based on activity levels within an account. A sample of financial plans will be reviewed consistent with any agreement entered into by the client and the firm. William J. Raike III can be contacted at (800) 279-4468.