

**Form ADV Part 2B - Brochure Supplement  
Item 1: Cover Page  
January 2025**

**Kevin A. Kennedy, CPA**

**CRD# 2891568**

**Kennedy Wealth & Tax Management, LLC  
One Pomperaug Office Park, Suite 307  
Southbury, CT 06488**

**[www.kennedywealth.com](http://www.kennedywealth.com)**

**Firm Contact:  
Kevin A. Kennedy, CPA  
Chief Compliance Officer**

This brochure supplement provides information about Kevin A. Kennedy, CPA that supplements our brochure. You should have received a copy of that brochure. Please contact Kevin A. Kennedy, Chief Compliance Officer if you did not receive Kennedy Wealth & Tax Management, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Kennedy is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2: Educational Background & Business Experience

**Kevin Andrew Kennedy, CPA**

**Year of Birth:** 1969

### **Educational Background:**

- 1991: University of Connecticut; Bachelor of Science in Accounting

### **Business Background:**

- 09/2014 – Present Kennedy Wealth & Tax Management, LLC;  
Managing Member and Investment Adviser Representative
- 09/1995 – Present Kennedy & Company, PC, CPA's; President and Tax Preparer
- 06/2003 – 09/2014 Cambridge Investment Research, Inc.;  
Registered Representative
- 06/2003 – 09/2014 Cambridge Investment Research Advisors, Inc.;  
Investment Adviser Representative

### **Exams, Licenses & Other Professional Designations:**

- 10/2007 – Series 62
- 01/2003 – Series 65
- 07/1997 – Series 6
- 07/1997 – Series 63
- 02/1995 – Certified Public Accountant

### **Certified Public Accountant (CPA)**

Mr. Kennedy has a professional designation, Certified Public Accountant. CPAs are licensed and regulated by their state boards of accountancy. Experience and testing requirements for licensure as a CPA generally include minimum college education, minimum experience levels, and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of continuing professional education. Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous *Code of Professional Conduct* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to the evaluation of Mr. Kennedy.

## Item 4: Other Business Activities

Mr. Kennedy is also a Certified Public Accountant and offers tax preparation through Kennedy & Company, PC, CPA's. While he assists in tax preparation, he does not have signatory authority over client accounts. He devotes approximately 80 hours per month to this activity. His duties entail gathering tax related client data, preparing tax returns, and advising on tax planning strategies. Clients are under no obligation to utilize this service.

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

Mr. Kennedy does not receive any other economic benefit for providing advisory services in addition to advisory fees.

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

Mr. Kennedy is the owner and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.