
Part 2B of Form ADV: Brochure Supplement

Jeffrey John Casey

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This brochure supplement provides information about Jeffrey John Casey that supplements the Capital Asset Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact Ken Evangelista at 517-339-7662 if you did not receive Capital Asset Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Jeffrey John Casey is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: Jeffrey John Casey **Born:** 1973

Education

Michigan State University; BA, Finance; 1998

Designations

Certified Financial Planner® (CFP®)¹

Chartered Financial Consultant (ChFC)²

Accredited Investment Fiduciary® (AIF®)³

Business Experience

Capital Asset Advisory Services, LLC (“CAAS”); Investment Advisor Representative; from 09/1999 to Present

Geneos Wealth Management, Inc.; Registered Representative; from 09/2017 to 02/019

WFG Investments, Inc.; Registered Representative; from 05/2015 to 09/2017

Invest Financial Corporation; Registered Representative; from 01/2009 to 05/2015

Capital Asset Insurance Services; Agent; 10/2001 to Present

CG Financial Services; Financial Advisor; 10/2001 to Present

Item 3 Disciplinary Information

Mr. Casey has no reportable disciplinary history.

Item 4 Other Business Activities

¹ The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards.

² The ChFC program is administered by the American College, Bryn Mawr, Pennsylvania. This designation has the same core curriculum as the CFP® designation, plus two or three additional elective courses that focus on various areas of personal financial planning. In addition to successful completion of an exam on areas of financial planning, including income tax, insurance, investment and estate planning, candidates are required to have a minimum of three (3) years' experience in a financial industry position.

³ Accredited Investment Fiduciary® designees are licensed by the Center of Fiduciary Studies, a part of fi360 company. AIF® certification requirements include: Successful completion of the 90 minute, closed-book, 60 question AIF® exam, indicating at least 75% correct answers; Successful completion of six hours of continuing professional education, four hours of which are fi360 training continuing education; Signing and agreeing to abide by a code of ethics.

A. Investment-Related Activities

Mr. Casey is an owner of Capital Asset Insurance Services. As a licensed insurance agent, he provides fixed insurance products through Capital Asset Insurance Services. He may receive compensation for his activities as an insurance agent. Mr. Casey is an owner of CG Financial Services and CG Financial Services of Caro, financial advisory services companies through which he markets and administers these services. Clients of CG Financial Services, CG Financial Services of Caro, and Capital Asset Advisory Insurance Services may also be clients of CAAS.

He may receive commissions for insurance products sold through Capital Asset Insurance Services. Thus, a conflict of interest exists between the interests of Mr. Casey and those of our advisory clients. No client is obligated to purchase insurance through any other firm represented by Mr. Casey.

B. Non-Investment-Related Activities

Mr. Casey is an owner of Wealth Advisory Group, which provides compliance and support services for CAAS branch offices.

Mr. Casey is an owner CG Accounting & Tax Services, Inc., which is an accounting firm. This firm may provide accounting and tax preparation services to advisory clients for separate and typical compensation. This presents a conflict of interest in that Mr. Casey has an incentive to recommend this firm to advisory clients in need of accounting services. No advisory client is obligated to use this accounting firm, and no accounting client is obligated to use our advisory services.

Mr. Casey is an owner of WAG Insurance Agency, which is an insurance agency providing life insurance products and services. This firm may provide insurance services to advisory clients for separate and typical compensation. This presents a conflict of interest in that Mr. Casey has an incentive to recommend this firm to advisory clients in need of insurance services. No advisory client is obligated to use this insurance agency, and no insurance client is obligated to use our advisory services.

Mr. Casey is an owner of TCG Insurance Agency, which is an independent insurance agency providing insurance products and services such as property and casualty and disability. This firm may provide insurance services to advisory clients for separate and typical compensation. This presents a conflict of interest in that Mr. Casey has an incentive to recommend this firm to advisory clients in need of insurance services. No advisory client is obligated to use this insurance agency, and no insurance client is obligated to use our advisory services.

Item 5 Additional Compensation

As noted above, Mr. Casey may receive compensation for his activities as an insurance agent, and may indirectly benefit if clients elect to use CG Accounting & Tax Services, Inc. for accounting services and TCG Insurance Agency for insurance services.

Mr. Casey is eligible to receive incentive awards (including prizes such as trips or bonuses) for recommending certain types of insurance policies or other investment products that he recommends.

While Mr. Casey endeavors at all times to put the interest of our clients first as part of our fiduciary duty, the possibility of receiving incentive awards creates a conflict of interest, and may affect his judgment when making recommendations.

Item 6 Supervision

Supervisor: Kenneth Evangelista

Title: Chief Compliance Officer

Phone Number: 517-339-7662

CAAS' procedures for supervising the activities of its investment adviser representatives include periodic reviews of branch offices and an annual review to ensure that compliance policies and procedures are being followed.