
Part 2B of Form ADV: Brochure Supplement

David Michael Robinson
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This brochure supplement provides information about David Michael Robinson 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 David Michael Robinson is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: David Michael Robinson

Born: 1960

Education

Northwood University; BA in Business Administration; 2003

Business Experience

Capital Asset Advisory Services, LLC; Investment Advisor Representative; from 02/2013 to Present

Geneos Wealth Management; Registered Rep; from 08/2017 to 04/2023

WFG Investments; Registered Rep; from 05/2015 to 08/2017

Invest Financial; Registered Rep; from 12/2010 to 05/2015

Designations

Certified Financial Planner[®] (CFP)¹

Item 3 Disciplinary Information

Mr. Robinson has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

Mr. Robinson is a licensed insurance agent and provides fixed insurance products through Capital Asset Insurance Services, in which he is an owner. He receives compensation for his activities as an insurance agent. Mr. Robinson markets and administers these services through CG Financial Services, a financial advisory services company in which Mr. Robinson is an owner. Clients of CG Financial 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. Robinson and those of our advisory clients. No client is obligated to place securities transactions or purchase insurance through any firm represented by Mr. Robinson.

Item 5 Additional Compensation

As noted above, Mr. Robinson may receive compensation for his activities as a registered representatives or insurance agent.

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.

Mr. Robinson 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. Robinson 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.