
Part 2B of Form ADV: Brochure Supplement

Jonathan Lee Cohen
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This brochure supplement provides information about Jonathan Lee Cohen 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 Jonathan Lee Cohen is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: Jonathan Lee Cohen

Born: 1963

Education

The Ohio State University; Bachelor of Arts in Food & Technology; 1985

Central Michigan University; Master of Science in Administration

Designations

Certified Financial Planner[®] (CFP[®])¹

Chartered Financial Consultant (ChFC)²

Certified Investment Management AnalystSM (CIMA[®])³

Business Experience

Capital Asset Advisory Services, LLC (“CAAS”); Investment Advisor Representative and Partner; from 06/1999 to Present

CG Financial Services; Investment Advisor Representative (DBA); 10/2001 to Present

Geneos Wealth Management, Inc.; Registered Representative; 08/2017 to 04/2023

WFG Investments, Inc.; Registered Representative; 05/2015 to 08/2017

Capital Asset Insurance Services; Agent; 10/2001 to 08/2017

The Capital Group; Registered Representative; 06/1999 to 08/2017

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

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 The CIMA certification signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for investment management consulting, including advanced investment management theory and application. Prerequisites for the CIMA certification are three years of financial services experience and an acceptable regulatory history. To obtain the CIMA certification, candidates must pass an online Qualification Examination, successfully complete a one-week classroom education program provided by a Registered Education Provider at an AACSB accredited university business school, pass an online Certification Examination, and have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements. CIMA designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through Investment Management Consultants Association (IMCA).

Item 3 Disciplinary Information

Mr. Cohen has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

Mr. Cohen is an investment adviser registered with the Securities and Exchange Commission. In addition, Mr. Cohen is a licensed insurance agent and provides fixed insurance products through Capital Asset Insurance Services and he may receive compensation for his activities insurance agent. Mr. Cohen markets and administers these services through the DBA CG Financial Services.

He may also receive commissions for insurance products sold through Capital Asset Insurance Services. Thus, a conflict of interest exists between the interests of Mr. Cohen and those of our advisory clients. Our financial planning, 401(k) and non-discretionary clients are under no obligation to purchase products recommended by Mr. Cohen. No client is obligated to purchase insurance through any other firm represented by Mr. Cohen.

B. Non-Investment-Related Activities

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

Mr. Cohen 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. Cohen 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. Cohen 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. Cohen 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. Cohen 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. Cohen 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. Cohen 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. Cohen 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. Cohen 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.