
Part 2B of Form ADV: Brochure Supplement

Josiah Whitten
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1/19/2022

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

Item 2 Educational Background and Business Experience

Full Legal Name: Josiah Whitten

Born: 1986

Education

University of Phoenix; BS in Business Management; 2013

Business Experience

Capital Asset Advisory Services, LLC; Investment Advisor Representative; from 07/2020 to Present

Mass Mutual Financial Group; Investment Advisor Representative; from 07/2016 to 07/2020

Principal Financial Group; Registered Rep; from 09/2014 to 06/2016

Item 3 Disciplinary Information

Mr. Whitten has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

Mr. Whitten is an Insurance Agent, where he sells fixed insurance products as well as Life product. Mr. Whitten sells fixed insurance for a variety of companies. He may receive compensation for his activities as an insurance agent.

Item 5 Additional Compensation

As noted above, Mr. Whitten may receive compensation for his activities as an insurance agent.

Mr. Whitten 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. Whitten 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.