
Part 2B of Form ADV: Brochure Supplement

Kenneth Patrick Evangelista
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Capital Asset Advisory Services, LLC
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4/24/2023

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

Item 2 Educational Background and Business Experience

Full Legal Name: Kenneth Patrick Evangelista

Born: 1972

Education

Eastern Michigan University; English; 1995

Business Experience

Capital Asset Advisory Services, LLC (“CAAS”); Chief Compliance Officer; from 01/2006 to Present

LPL Financial; Registered Representative; from 04/2023 to Present

Geneos Wealth Management, Inc.; Office of Supervisory Jurisdiction Principal; 09/2017 to 04/2023

Wealth Advisory Group; Chief Operating Officer; 10/2005 to Present

WFG Investments, Inc.; Registered Representative and OSJ Principal; 05/2015 to 09/2017

Invest Financial Corporation; Registered Representative; 04/2009 to 05/2015

Item 3 Disciplinary Information

Mr. Evangelista has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

Mr. Evangelista is a registered representative of LPL Financial (“LPL”). LPL is a securities broker-dealer (a member of FINRA, SIPC) and an investment adviser registered with the Securities and Exchange Commission. In addition, Mr. Evangelista is a licensed insurance agent and provides fixed insurance products through Capital Asset Insurance Services. He may receive compensation for his activities as a registered representative or insurance agent.

As a registered representative of LPL, Mr. Evangelista may recommend securities or insurance products offered by LPL. 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. Evangelista 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. Evangelista. No client is obligated to place securities transactions or purchase insurance through LPL or to purchase insurance through any other firm represented by Mr. Evangelista.

B. Non-Investment-Related Activities

Mr. Evangelista is the Chief Operating Officer of Wealth Advisory Group, which provides compliance and support services for CAAS Branch Offices.

Item 5 Additional Compensation

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

Mr. Evangelista 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. Evangelista 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.