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## Part 2B of Form ADV: Brochure Supplement

Mark David Parker  
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Capital Asset Advisory Services, LLC  
15744 Peacock Road  
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517-339-7662

4/24/2023

This brochure supplement provides information about Mark David Parker 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 Mark David Parker is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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## Item 2 Educational Background and Business Experience

**Full Legal Name:** Mark David Parker

**Born:** 1962

### Education

Mr. Parker does not have a college degree.

### Business Experience

Capital Asset Advisory Services, LLC; Investment Advisor Representative; from 12/1997 to Present

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

CG Financial Services; Financial Advisor; from 12/1997 to Present

Capital Asset Insurance Services; Agent; from 12/1997 to Present

WFG Investments, Inc.; Registered Representative; from 03/2015 to 08/2017

Invest Financial Corporation; Registered Representative; from 12/2008 to 03/2015

## Item 3 Disciplinary Information

Mr. Parker has no reportable disciplinary history.

## Item 4 Other Business Activities

### A. Investment-Related Activities

Mr. Parker is an investment adviser registered with the Securities and Exchange Commission. In addition, Mr. Parker 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. Parker 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. Parker and those of our advisory clients. No client is obligated to purchase insurance through any other firm represented by Mr. Parker.

### B. Non-Investment-Related Activities

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

Mr. Parker 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. Parker has an incentive to recommend this firm to advisory clients in need of accounting

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services. No advisory client is obligated to use this accounting firm, and no accounting client is obligated to use our advisory services.

Mr. Parker 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. Parker 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. Parker may receive compensation for his activities as a registered representative or 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. Parker 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. Parker 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.