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## Part 2B of Form ADV: Brochure Supplement

Anthony Dean Bagneschi  
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Capital Asset Advisory Services, LLC  
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This brochure supplement provides information about Anthony Dean Bagneschi 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 Anthony Dean Bagneschi is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

**Full Legal Name:** Anthony Dean Bagneschi

**Born:** 1975

### Education

Central Michigan University; Master of Science in Administration; 2005

Ferris State University; Bachelor of Science; 1999

### Business Experience

Capital Asset Advisory Services, LLC; DBA CG Financial Services, Investment Advisor Representative; from Jan 2022 to Present

CG Financial Services; Financial Advisor; from Jan 2022 to Present

Sigma Planning Corporation; Investment Advisor Representative; from Dec. 2018 to Jan 2022

Parkland Securities LLC; Registered Representative; from Dec 2018 to Jan. 2022

PlanMember Securities Corporation; Registered Representative; from April 2018 to Nov. 2018

Williams & CO.; Representative/Insurance Agent; from April 2018 to Nov. 2018

EPI Advisors, LLC; Investment Advisor Representative; from Dec 2014 to Feb. 2018

EPI Group, LLC; Insurance Agent; from June 2014 to Feb. 2018

EPI Advisors, LLC; Investment Adviser Representative; from July 2014 to Feb. 2018

### Designations

Certified Financial Planner® (CFP)<sup>1</sup>

Retirement Income Certified Professional (RICP)<sup>2</sup>

Enrolled Agent (EA)<sup>3</sup>

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<sup>1</sup> 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.

<sup>2</sup> This designation is administered by the American College. This designation requires three years of professional experience. To earn this designation, the person must complete three required courses, equivalent to 9 semester credit hours. Additionally, they must pass a final exam for each course (closed book and proctored). The person must also complete 15 hours of continuing education every two years in order to maintain the designation.

<sup>3</sup> Enrolled Agents are enrolled by the Internal Revenue Service and authorized to use the EA designation. EA enrollment requirements: 1) Successful completion of the three-part IRS Special Enrollment Examination (SEE), or completion of five years of employment by the IRS in a position which regularly interpreted and applied the tax code and its regulations. 2.) Successfully pass the background check conducted by the IRS.

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### Item 3 Disciplinary Information

Mr. Bagneschi has a reportable event, details of which can be found on FINRA's BrokerCheck system ([www.finra.org/brokercheck](http://www.finra.org/brokercheck)) or the IAPD system ([www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)) by searching by Anthony Dean Bagneschi's CRD number, which is 4487939.

### Item 4 Other Business Activities

Mr. Bagneschi has no other investment-related or non-investment-related activities.

### Item 5 Additional Compensation

Mr. Bagneschi receives no other additional compensation.

### 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.