

WMS Advisors, LLC

11810 Grand Park Avenue, Suite 500
North Bethesda, MD 20852

(301) 294-7804

Dated June 10, 2024

Form ADV Part 2B – Brochure Supplement

For

Timothy T. Paschall, CFP[®]

Investment Advisor Representative

This brochure supplement provides information about Timothy Paschall that supplements the WMS Advisors, LLC (“WMS”) brochure. A copy of that brochure precedes this supplement. Please contact Timothy Paschall if the WMS brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Timothy Paschall is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 2180346.

Item 2: Educational Background and Business Experience

Timothy Taylor Paschall

Born:

Educational Background

- 1980 – Bachelor of Science, Major in Chemistry, Minor in Math, North Carolina State University

Business Experience

- 01/2022 – Present, WMS Advisors, LLC, Investment Advisor Representative
- 01/2022- Present, Grove Point Investments, LLC, Registered Representative
- 01/2022 – Present, Timothy Paschall dba Paschall & Associates, Principal and Owner
- 02/2002 – 12/2021, ProEquities, Inc., Registered Representative and Investment Advisor Representative
- 01/1997 – 02/2002, Royal Alliance Associates, Inc., Registered Representative

Professional Designations, Licensing & Exams

CERTIFIED FINANCIAL PLANNER™ professional

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board’s other certification marks (the “CFP Board Certification Marks”). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board’s high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the *Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement* and agree to be bound by CFP Board’s *Code of Ethics and Standards of Conduct* (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board’s *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times

when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the *Code and Standards*.

Chartered Life Underwriter™ (CLU®): The Chartered Life Underwriter™ (CLU®) is a designation of insurance expertise, helping gain a significant advantage in a competitive market. This course of study helps by providing in-depth knowledge of the insurance needs of individuals, business owners, and professional clients. Program Learning Objectives:

- Provide guidance to clients on types and amounts of life insurance needed
- Make recommendations on aspects of risk management, including personal and business uses of a variety of insurance solutions
- Provide guidance to clients on legal aspects of life insurance contracts and beneficiaries
- Assist clients in making decisions about estate planning, including the proper holding of assets and title to assets, as well as the implications of various wills and trust arrangements on financial, retirement and succession planning issues
- Provide a holistic and comprehensive approach to addressing the insurance planning needs of their clients

Professional Associations:

- Member, Financial Planning Association
- Member, Society of Financial Services Professionals

Exams

- Series 6 – Investment Company/Variable Contracts Products Limited Representative
- SIE – Securities Industry Essentials Examination
- Series 7 – General Securities Registered Representative
- Series 63 – Uniform Securities Agent

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client’s or prospective client’s evaluation of this advisory business.

Item 4: Other Business Activities

<p>Grove Point Investments, LLC Position: Registered Representative Start Date: 01/2022 Nature: Brokerage services; Investment Related: Yes Number of Hours: 20; Number of Investment Related Hours: 20 Description: Brokerage services.</p>	<p>Timothy Taylor Paschall Position: Insurance Agent Start Date: 01/01/2002 Nature: Insurance Sales Investment Related: Yes Number of Hours: 30; Investment Related Hours: 23 Description: Fixed Insurance brokerage services-life, disability, long term care.</p>
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Item 5: Additional Compensation

Timothy Paschall does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through WMS Advisors, LLC.

Item 6: Supervision

The investment advisor activities of Timothy Paschall are supervised by David R Williams and Thomas Gaines MacLennan of WMS. Please contact (301) 294-7804 if you have any questions or concerns.