

## **Part 2-B of Form ADV: *Brochure Supplement***

Cornerstone Wealth Management, Inc.  
2950 East Harmony Road  
Suite 395  
Fort Collins, CO 80528

Craig Alan Modellmog Sr.  
2950 East Harmony Road Suite 395  
Fort Collins, CO 80528  
(office) 970-225-0296  
(fax) 970-225-0297  
[craig@cornerstonewminc.com](mailto:craig@cornerstonewminc.com)  
[www.cornerstonewminc.com](http://www.cornerstonewminc.com)

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This brochure supplement provides information about Craig Alan Modellmog Sr. that supplements the Cornerstone Wealth Management, Inc. brochure. You should have received a copy of that brochure. Please contact Craig A. Modellmog Sr. at 970-225-0296 if you did not receive Cornerstone Wealth Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Craig Alan Modellmog Sr. is available on the FINRA website at <https://brokercheck.finra.org>. You can search this site by a unique identifying number, known as a CRD number. The CRD number for Craig A. Modellmog Sr. is 2369349.

## **Item - 2 Educational Background and Business Experience**

**Full Legal Name:** Craig Alan Modellmog Sr.      **Born:** 1967

### **Education**

- University of Northern Colorado; B.S., Public Relations/Business; 1991
- University of Northern Colorado; M.A., Athletic Administration; 1992

### **Business Experience**

- Cornerstone Wealth Management, Inc.; President; from 04/2009 to Present
- Private Client Services, LLC, Registered Representative, 04/2013 to Present
- LPL Financial, LLC, Registered Representative, 04/2009 – 04/2013
- Merrill Lynch; Resident Director; from 02/2005 to 04/2009
- LPL Financial; Regional Director; from 02/2002 to 02/2005

### **Licenses**

Craig Alan Modellmog Sr. has achieved the following license(s) and is in good standing with the granting authority:

- Series 7, 9, 10, 24, 63, 65 (administered by FINRA)

### **Designations**

Craig Alan Modellmog Sr. has earned the following designation(s) and is in good standing with the granting authority:

- Chartered Retirement Planning Counselor; College for Financial Planning; 2005

The Chartered Retirement Planning Counselor is awarded by the College for Financial Planning to applicants who complete course work in pre- and post-retirement needs, asset management, estate planning and retirement planning, pass an exam, adhere to a code of ethics and complete 16 hours of continuing education every two years.

## **Item - 3 Disciplinary Information**

Craig Alan Modellmog Sr. has no reportable disciplinary history.

## **Item - 4 Other Business Activities**

### **A. INVESTMENT-RELATED ACTIVITIES**

Craig Alan Modellmog Sr. is also engaged in the following investment-related activities:

#### **Registered representative of a broker-dealer:**

Craig Alan Modellmog Sr. is a registered representative of Private Client Services, LLC (“PCS”), a broker-dealer registered with FINRA. As such, he is able to receive separate, yet customary commission compensation resulting from implementing securities transactions on behalf of advisory clients. Clients, however, are not under any obligation to execute securities transactions through PCS, and in fact may be required to direct brokerage to TD Ameritrade, Inc. (i.e. only specialized, insurance-related securities transactions would be executed through PCS). The implementation of any or all insurance-related recommendations is solely at the discretion of the client.

Craig Alan Modellmog Sr. receives commissions, bonuses or other compensation on the sale of securities or other investment products.

#### **Licensed as an insurance agent:**

Craig Alan Modellmog Sr. is licensed as an agent for various insurance companies. As such, he is able to receive separate, yet customary commission compensation resulting from implementing insurance product transactions on behalf of advisory clients. Clients, however, are not under any obligation to engage Mr. Modellmog when considering implementation of insurance recommendations. The implementation of any or all insurance recommendations is solely at the discretion of the client. Please refer to Item 10 of Form ADV Part 2A for further information on this topic.

### **B. NON INVESTMENT-RELATED ACTIVITIES**

Craig Alan Modellmog Sr. is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his or her time.

## **Item - 5 Additional Compensation**

Craig Alan Modellmog Sr. does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## **Item - 6 Supervision**

**Supervisor:** Craig Modellmog Sr.

**Title:** CEO/CCO/CIO

**Phone Number:** 970-225-0296

**Fax:** 970-225-0297

## **Item - 7 Requirements for State-Registered Advisers**

### **A. Additional Disciplinary History**

Craig Alan Modellmog Sr. has no additional reportable disciplinary history.

### **B. Bankruptcy History**

Craig Alan Modellmog Sr. has not been the subject of a bankruptcy petition.