

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

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**DBA Corbett Road Investment Management**

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**T**his brochure supplement provides information about Christopher Scott Airey that supplements the Spire Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Sue McKeown 703-657-6060 if you did not receive Spire Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Christopher Scott Airey is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 1**

Christopher Scott Airey, an Investment Advisor Representative of Spire Wealth Management is the owner and President of **Corbett Road Investment Management**, which provides separate account management services to Advisors and Institutions by offering three strategies outlined below.

### **Corbett Road Dynamic Strategy**

### **Corbett Road Opportunity Strategy**

### **Corbett Road Core Demand Strategy**

### **Corbett Road MyPath Strategies**

### **Corbett Road EDGE Strategy**

## **Strategy Descriptions**

### **Corbett Road Opportunity Strategy**

#### Investment Objective

The Corbett Road Opportunity Strategy seeks long-term growth of capital. The strategy primarily invests in a concentrated portfolio of individual equities of any market capitalization. It may also invest in, and may shift frequently among different asset classes such as fixed income, precious metals, commodities, developed and emerging international securities, and cash and cash equivalents.

#### Investment Strategy

Within the Opportunity Strategy, Corbett Road implements both a “top-down” and “bottom up” approach to research and investment. The “top down” macro analysis determines the percentage of the investment allocated to equity securities based on economic conditions and the overall position of the business cycle, while bottom-up analysis focuses on fundamental research and individual companies. Through our dual approach, economic events can be recognized for their potential to affect the overall performance of the market (top down) and analysis of individual investment values within the macroeconomic overlay (bottom up) can add to potential returns.

The Strategy’s Goals Include:

Long term growth of capital

Maximize returns or mitigate losses through top down economic overlay

Maximize returns through bottom up analysis

Mitigate losses using the internal sell discipline

Opportunity Strategy:

- Invests primarily in individual equities and occasionally ETF's
- The strategy can invest in any exchange traded asset class, any market cap, foreign and domestic
- Top down and bottom up investment selection
- The strategy can go to cash, short term fixed income, and other defensive assets in times of market stress
- \$100,000 minimum

## **Corbett Road Core Demand Strategy**

Investment Objective

The Corbett Road Core Demand Strategy seeks long term growth of capital as its primary goal and capital preservation as its secondary goal.

Investment Strategy

Corbett Road's Core Demand Strategy is a combination individual stock and ETF strategy. This mainly value oriented strategy invests in company's whose demand is largely inelastic. The strategy also places emphasis on consistent earning and higher than normal dividend payouts.

Core Demand also utilizes a peak return sell discipline whereby risk is reduced at different loss levels from **peak strategy return**. Risk is then added back to the portfolio based increases in **market returns** from the market trough.

- Uses ETF's and individual stocks
- Core ETF sector exposure
- Alpha producing stock exposure
- Low \$50,000 minimum
- Unique "peak return" sell discipline to strategy

## **Corbett Road Dynamic Strategy**

### Investment Objective

The Corbett Road Dynamic ETF Strategy seeks long term growth of capital as its primary goal and capital preservation as its secondary goal. The strategy invests exclusively in exchange traded funds (ETF's).

### Investment Strategy

Corbett Road's Dynamic ETF Strategy is a flexible all ETF strategy. Through a proprietary research process, the portfolio is allocated across various asset classes to maximize risk adjusted returns. Dynamic uses both strategic and tactical "Stratical" allocation using a core/satellite approach in order to adjust the exposure to riskier assets depending on market conditions.

- Uses ETF's exclusively
- Core/Satellite approach is driven by over and underweighting specific indices/sectors
- Uses "MVM" (macro, value and momentum) for satellite investment selection
- Low \$50,000 minimum
- Unique sell discipline to strategy
- Best used in Qualified accounts

## **Corbett Road EDGE Strategy**

### Investment Objective

The Corbett Road EDGE Strategy seeks to primarily generate above average income using both the equity and fixed income markets with some potential for capital appreciation over the long term.

### Investment Strategy

Corbett Road EDGE Strategy is an ETF strategy that invests in the equity, convertible and preferred issues, MLP's and fixed income. Used as a compliment to produce income to low yielding fixed income strategies.

- Uses ETF's exclusively
- Low \$50,000 minimum
- High Income with Capital Appreciation potential

## **Corbett Road MyPath Strategies**

### Investment Objective

The Corbett Road MAAP™ Strategies (MyPath Asset Allocation Portfolios) offer 8 different allocations from aggressive to conservative. At its most aggressive the strategy seeks to achieve long-term growth through asset class, sector and geographic diversification. At its most conservative the strategy can provide income and capital preservation through borrower, quality, duration and geographic diversification.

### Investment Strategy

All MAAP™ strategies use Corbett Road's MACROCAST™ analysis to signal an appropriate time to shift asset classes and/or exercise a portfolio level rebalance. This strategic initiative can occur proactively or reactively up to 3x per year and can also trigger investments beyond traditional asset classes in times of economic stress.

The MAAP™ strategies can be utilized as a stand alone solution or in conjunction with the firm's tactical asset strategies as a Core/ Satellite approach to investing.

Model allocations will range from 100% Equity with focus on long term growth to a 30% Equity 70% Fixed Income model for those clients that are looking for higher emphasis on preservation of capital and income.

- Uses ETF's exclusively
- Low \$50,000 minimum
- Reduces Investment cost and greater tax efficiency
- Ongoing investment monitoring and rebalancing
- Complements Corbett Road's SmartTactical™ Strategies

## **Corbett Road Members**

### **C. Scott Airey, CFP®, AWMA®**

Scott has over twenty three years of professional experience and over seventeen years of investment management/consulting experience. Scott founded Corbett Road Wealth Management in 2002 (formerly known as VZN Group Wealth Management) with the belief that tactical asset management using a top-down macroeconomic approach is more effective than the modern portfolio theory and buy & hold approach used by

many advisors in the wealth management industry. Scott is a member of the Corbett Road Investment Committee. Prior to founding the VZN Group Wealth Management, Scott spent a year as a Branch Manager at Charles Schwab & Co. in Alexandria, Virginia. Scott began his career in the financial services industry at Legg Mason Wood Walker in Baltimore City, Maryland and Alexandria, Virginia. Scott is a CFP® Practitioner, holds the FINRA Series 7,9,10, 63, 65 licenses and Life, Health and Variable Annuity Insurance licenses.

**Jeffrey McCoy AAMS®**

Jeff is Senior vice President and serves on the investment committee of Corbett Road Investment Management. Jeff has over 21 years of experience in financial services. Prior to joining Corbett Road, Jeff spent the last 17 years at Charles Schwab & Co., as VP/Branch Manager overseeing several branch locations in Maryland and Virginia with branch assets of \$6.5 Billion. As a branch manager Jeff was responsible for branch P&L, compliance, sales revenue growth, oversight of investment recommendations and financial planning delivery for his teams. Jeff spent his early years in the industry with T. Rowe Price Associates and Legg Mason Wood Walker in Baltimore, Maryland. Jeff has a Bachelor's of Science in Consumer Economics from the University of Delaware and holds the FINRA Series 7, 9, 10, 63, 65 licenses and AAMS® designation

**Rush Zarrabian, CFA**

Rush is a Portfolio Manager for Corbett Road Investment Management managing both the Opportunity and Dynamic ETF strategies. He joined Corbett Road Wealth Management in 2007 as a research analyst. In 2013 he helped launch Corbett Road Investment Management, which focuses on separate accounts for institutions and Financial Advisors. During his tenure with Corbett Road, he developed and implemented the Corbett Road Macro Model into the investment process. Before joining Corbett Road, Rush worked at two of the largest financial institutions in the country in a variety of roles, including management, operations, and lending. Rush has a Bachelor's of Science in Finance from Virginia Tech and holds FINRA Series 7 and 66 licenses. He is a CFA Charter holder and a member of the CFA Institute and CFA Society of Washington, D.C.

**Matthew Gaffey, CFP®, ChFC®**

Matthew is a Senior Wealth Manager for Corbett Road Wealth Management. He offers clients more than nine years of financial services, retirement planning, and investment management experience. His focus is centered on advising clients on the development and implementation of investment strategies to help clients in meeting their immediate and future goals. He follows a disciplined process of assessing a client's financial situation, determining risk tolerance, and forming and executing an appropriate investment plan in

order to obtain measurable results. He also consults on retirement planning, risk management, and other critical financial strategies.

Prior to joining Corbett Road, Matthew worked for Fidelity Investments and was a President's Circle Award Winner. Matthew has earned the professional designations of Certified Financial Planner™ and Chartered Financial Consultant®. He is a native of Northern Virginia and received a Bachelor's of Science from Virginia Tech. He holds FINRA Series 7 and 66 licenses, as well as Life, Health, and Variable Annuity insurance licenses. Matthew is a member of the Financial Planning Association, Loudoun County Chamber of Commerce, and Virginia Tech Alumni Association.

### **Sean Rosencrance**

Sean further enhances client relationships by providing superior service and operational efficiency. He earned a Bachelor's of Science in Finance with a concentration in Financial Planning at Virginia Tech and is a member of the Virginia Tech Alumni Association. He is currently working towards the FINRA Series 7 and 66 licenses and has plans to pursue the Certified Financial Planner™ designation.

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

**Full Legal Name:** Christopher Scott Airey      **Born:** 1968

### **Education**

- Univ of Delaware; BS, Economics; 1991
- Univ of Baltimore; MBA, Master of Bus Admin; 2002

### **Business Experience**

- Corbett Road President and Spire Wealth Management, LLC; Investment Advisor; from Aug 2003 to Present

## **Item 3 Disciplinary Information**

Christopher Scott Airey had been found by FINRA in 2009 to have been involved in a private securities transaction, to which he failed to file an Outside Business Activity (OBA) in a timely manner which is a violation of FINRA rules.

\* Christopher Scott Airey received no customer complaints on this activity and received no compensation from this activity.

## **Item 4 Other Business Activities**

### **A. Investment-Related Activities**

Christopher Scott Airey, an Investment Advisor Representative of Spire Wealth Management and is the owner and President of **Corbett Road Wealth Management**, which provides customized Wealth Management solutions to unique clientele in Northern Virginia, Maryland and DC for over 20 years. We differentiate our company through a unique, proprietary approach to tactical asset management, comprehensive financial planning and a very high level of client service.

1. Christopher Scott Airey is also engaged in the following investment-related activities:

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

Advisor also carries the securities license required by FINRA (Financial Industry Regulatory Authority) in order to offer securities products and execute securities transactions in addition to their registration as an Investment Advisor representative providing investment advice. This additional licensing allows our advisors a much more robust suite of products to offer to their clients. Registration, supervision and continuing education are all requirements for maintaining this type of registration.

Conflicts of holding this type of license could be in cross-selling. Selling out of an advisory account and buying in a securities account and thereby generating a commission for the representative. Moving monies from an advisory account into a commission account in order to affect a commissionable trade.

The types of commissions that may be earned on these types of accounts/products could be any one of the following:

1. Mutual Fund 12b-1 commissions
2. Mutual Funds Trail Commissions
3. Direct Product Sponsor Commissions

#### Insurance company or agency

Licensed as an insurance representative allows the advisor to offer various insurance products such as Variable Annuities, Life Insurance, Long Term Care insurance. Typically these products generate commission payments to the representatives selling the products. The ability to offer these products to clients allows the advisor a much more robust suite of products and thereby providing the client with a much more comprehensive financial plan

2. Christopher Scott Airey receives commissions, bonuses or other compensation on the sale of securities or other investment products.



Holding these additional licenses and allowing the advisor the ability to offer securities products and insurance products in addition to their investment advice, may create a conflict of interest if the advisor is recommending these products in order to generate commissions rather than looking out for the best interests of the client. Each of these purchases is reviewed and approved by a principal of the firm. In addition, many of these products come with additional disclosures so that the client can fully understand the product.

Christopher Scott Airey is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

## **Item 5 Additional Compensation**

Christopher Scott Airey does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## **Item 6 Supervision**

**Supervisor:** William Chao

**Title:** Director of Operations

**Phone Number:** 703-657-6063

In addition to an annual in person review of our firms policies and procedures, each advisor is subject to the following ongoing supervision and review:

Daily trade reviews

Monthly review of personal securities accounts

Monthly correspondence reviews – including ongoing capture and review of email

Periodic reviews of client account activity