

*This brochure supplement provides information about Daniel Colin McNabb that supplements the M. Kulyk & Associates, LLC brochure. You should have received a copy of that brochure. Please contact Daniel Colin McNabb if you did not receive M. Kulyk & Associates, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Daniel Colin McNabb is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **Chicory Wealth**

Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Daniel Colin McNabb**

Personal CRD Number: 6320759

Investment Adviser Representative

M. Kulyk & Associates, LLC  
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Decatur, GA 30033  
(404) 294-5917  
[danielmcnabb@chicorywealth.com](mailto:danielmcnabb@chicorywealth.com)

UPDATED: 3/8/2021

## Item 2: Educational Background and Business Experience

**Name:** Daniel Colin McNabb, CFP®

**Born:** 1992

### Educational Background and Professional Designations:

#### Education:

Bachelor of Arts Accounting, University of Georgia - 2014

#### Professional Designations:

**Certified Financial Planner (“CFP”)** - CFP certificants must pass the comprehensive CFP Certification Examination, pass CFP Board's Candidate Fitness Standards, agree to abide by CFP Board's Code of Ethics and Professional Responsibility which puts clients’ interests first, and comply with the Financial Planning Practice Standards which spell out what clients should be able to reasonably expect from the financial planning engagement. In addition to completing courses that cover the financial planning topics required for CFP certification, a bachelor's degree (or higher), or its equivalent (in any discipline, from an accredited college or university) is required to attain CFP certification. The bachelor's degree requirement is a condition of initial certification; it is not a requirement to be eligible to take the CFP Certification Examination.

#### Business Background:

01/2018 - Present

Investment Advisor Representative  
M. Kulyk & Associates, LLC

06/2014 - 01/2018

Operations Specialist  
Maggie Kulyk & Associates, a private wealth  
advisory practice of Ameriprise Financial, Inc.

## 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**

Daniel Colin McNabb is not engaged in any investment-related business or occupation (other than this advisory firm).

#### **Item 5: Additional Compensation**

Daniel Colin McNabb does not currently have any arrangements where he receives substantial economic benefit from someone other than a client for providing investment advice.

#### **Item 6: Supervision**

As a representative of Maggie Kulyk & Associates, LLC, Daniel McNabb is supervised by James Hadaway, the firm's Chief Compliance Officer. Mr. Hadaway is responsible for ensuring that Daniel McNabb adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for James Hadaway is (513) 832-5477.