

*This brochure supplement provides information about Katherine Hagedorn that supplements the M. Kulyk & Associates, LLC dba Chicory Wealth brochure. You should have received a copy of that brochure. Please contact Margaret A Kulyk if you did not receive Chicory Wealth's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Katherine Hagedorn 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*

### **Katherine Hagedorn**

Personal CRD Number: 6196836

Investment Adviser Representative

Chicory Wealth  
148 Mead Road  
Decatur, GA 30030  
(404) 294-5917  
[katiehagedorn@chicorywealth.com](mailto:katiehagedorn@chicorywealth.com)

UPDATED: 10/7/2021

## Item 2: Educational Background and Business Experience

**Name:** Katherine D. Hagedorn, CFP®, CRPC®, BFA™ **Born:** 1991

### **Education:**

Bachelor of Science in Business, Virginia Tech University - 2013

### **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.

**Chartered Retirement Planning Counselor (“CRPC® ”)** – Individuals who hold the CRPC® designation have completed a course of study encompassing pre-and postretirement needs, asset management, estate planning and the entire retirement planning process using models and techniques from real client situations. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

**Behavioral Financial Advisor (“BFA™”)** – Individuals who hold the BFA™ designation have completed a two-course program related to behavioral finance. The program was designed to train, develop and improve the moral and emotional competencies necessary to help clients make better decisions throughout the financial planning process. Once the program has been completed, candidates must pass a certification exam. BFA™ designees must complete 20 hours of continuing education requirements every two years.

### **Business Background:**

2/2021 – Present	Investment Advisor Representative, Chicory Wealth
6/2013 – 2/2021	Registered Rep, Ameriprise Financial Services, 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**

Katherine Hagedorn is not engaged in any investment-related business or occupation (other than this advisory firm).

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

Katherine Hagedorn does not currently have any arrangements where she receives substantial economic benefit from someone other than a client for providing investment advice.

### **Item 6: Supervision**

Katherine Hagedorn's advisory activities are supervised by James Hadaway, Chief Compliance Officer of Chicory Wealth. Mr. Hadaway is responsible for ensuring that Katherine Hagedorn 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.