

*This brochure supplement provides information about Brenda Allen Sakon 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 Brenda Allen Sakon 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*

### **Brenda Allen Sakon**

Personal CRD Number: 7339978

Investment Adviser Representative

Chicory Wealth  
148 Mead Road  
Decatur, GA 30030  
(404) 294-5917

[allensakon@chicorywealth.com](mailto:allensakon@chicorywealth.com)

UPDATED: 10/7/2021

## Item 2: Educational Background and Business Experience

**Name:** Brenda Allen Sakon **Born:** 1969

### **Education:**

Master of Accountancy, University of Alabama – 1993

Bachelor of Science, University of West Alabama – 1992

### **Professional Designations:**

#### **CPA - Certified Public Accountant**

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination.

In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's Code of Professional Conduct within their state accountancy laws or have created their own.

### **Business Background:**

6/2021 – Present	Financial Advisor, Chicory Wealth
02/2021 – 05/2021	Financial Advisor, Benedetti, Gucer & Associates
11/2018 – 02/2021	Accountant, Immaculate Heart of Mary Catholic Church

### **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**

Brenda Allen Sakon is not engaged in any investment-related business or occupation (other than this advisory firm).

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

Brenda Allen Sakon 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**

Brenda Allen Sakon's advisory activities are supervised by James Hadaway, Chief Compliance Officer of Chicory Wealth. Mr. Hadaway is responsible for ensuring that Ms. Sakon 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.