

CORRIGAN WICKMAN ADVISORY, LLC

**400 NE 2nd STREET
PO BOX 648
McMINNVILLE, OR 97128**

(503) 472-4631

Fax (503) 472-6992

www.well-thplanning.com

3/31/2011

**FORM ADV PART 2
BROCHURE**

This brochure provides information about the qualifications and business practices of Corrigan Wickman Advisory, LLC. If you have any questions about the contents of this brochure, please contact us at (503)472-4631 or corriganwickman@well-thplanning.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Corrigan Wickman Advisory, LLC, is also available on the SEC's website at www.adviserinfo.sec.gov. The searchable IARD/CRD number for Corrigan Wickman Advisory, LLC, is 133901.

Corrigan Wickman Advisory, LLC, is a Registered Investment Adviser. Registration with the United States Securities and Exchange Commission or any state securities authority does not imply a certain level of skill or training.

SUMMARY OF MATERIAL CHANGES

Corrigan Wickman Advisory, LLC's Brochure has been updated. There have been no material changes since the last annual update of our brochure on March 1, 2010.

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Advisory Business

Form ADV Part 2A, Item 4

Corrigan Wickman Advisory, LLC, (and its predecessors) have been in operation since 1971. The principal owners are Daniel O. Corrigan (50%) and Mark D. Wickman (50%). Corrigan Wickman Advisory, LLC, is a state-registered Investment Advisor. Currently, Corrigan Wickman Advisory, LLC, registers with the States of Oregon and Washington.

We use a multi-disciplinary team approach to addressing clients' financial, tax, estate and risk management planning needs by meeting as needed with the client's other advisers: attorneys, certified public accountants, and boards of directors.

Corrigan Wickman Advisory, LLC, generally implements investments through SEI Private Trust Company. SEI uses a "manager of manager", so our role is not continuous, regular oversight of the specific assets in the portfolio. Rather, our role is to assist the client in the selection of the asset allocation model most suited to the investor profile, and then to monitor and make adjustments as dictated through ongoing relationship. We may mutually agree to construct a custom portfolio, but always on a non-discretionary basis. Typical SEI asset allocation models include any or all of the following types of mutual funds consisting of US and foreign equities, US fixed income and bonds, emerging markets equities and debt, real estate and Money Market.

Corrigan Wickman Advisory, LLC, routinely provides written data, addressing topics including budget information, planning for children's education, retirement, insurance and estate planning.

Corrigan Wickman Advisory, LLC, primarily advises individuals, as well as trusts and estates, and small businesses. We have a few clients who sponsor employer 401k and profit sharing plans. While very limited, we also advise some charitable organizations. All clients go through initial interviews to determine the scope of engagement and assess whether the relationship is a good fit for our firm. Based upon data gathering and goal setting, implementation decisions regarding investments and insurance are made with mutual consent of advisor and client.

Some clients go through a Discovery interview process utilizing a game board and tiles to determine current and future goals. From that, reports specific to each client are generated outlining a vision for the future and ideal timeline to reach each of the client's goals. The timeline is reviewed from time-to-time to help move clients forward with their goals and to determine what changes or additions need to be made. Determining a client's risk tolerance, attitude, perception and an appropriate time horizon for the investment are necessary parts of the process. We discuss and mutually agree upon decisions to implement the appropriate investment strategies unique to a client's situation. If we decide to invest with SEI Private Trust Company clients receive an investment policy statement which outlines the procedures, investment philosophy, guidelines and constraints for the client and Corrigan Wickman Advisory, LLC. If we decide it is more suitable to invest with another investment company or bank, we assist clients with that custodian's required paperwork.

We review portfolio and investment goals at least annually with our clients to determine whether any of their investment objectives have changed. Reviews often occur more regularly than once per year. We encourage clients to call at any time to ask questions, make changes to existing investments or possible future investments, and to arrange mutually convenient times to meet.

Corrigan Wickman Advisory, LLC, does not recommend any fund which possesses a 12b-1 fee.

Corrigan Wickman Advisory, LLC, manages all client assets on a non-discretionary basis. It is our policy to obtain a client signature before processing any account transactions. As of December 31, 2010, the value of the assets held at SEI Private Trust Company were \$44,727,774. This amount is used to calculate assets under management fees only. While Corrigan Wickman Advisory, LLC, advises on those allocations, we do not provide ongoing, continuous supervisory oversight of these funds.

Fees and Compensation

Form ADV Part 2A, Item 5

The majority of Corrigan Wickman Advisory, LLC's, advisory fees are based on assets invested with SEI Private Trust Company. Our typical fee schedule is as follows:

<u>Value of Account(s)</u>	<u>Annual Fee</u>
Up to \$ 1,000,000	1.00%
Next \$ 2,000,000	.75%
Next \$ 2,000,000	.50%
Next \$ 5,000,000	.35%
Next \$10,000,000	.30%

Some clients have negotiated a different fee schedule. If there is no implementation of investments through SEI Private Trust Company clients can elect to pay a set annual fee. This fee is based on the specific situation, but in general is from \$5,000 to \$10,000 annually. There are some clients who pay more or less based on their particular planning needs.

Clients who implement through SEI Private Trust company have fees deducted directly from their SEI accounts on a quarterly basis. Most fees are based on the value of the account at the end of each calendar quarter. Some clients pay a set fee deducted from their SEI account.

Clients who do not implement through SEI Private Trust company pay a set annual fee and are invoiced by Corrigan Wickman Advisory, LLC, either quarterly or semi-annually. Clients may choose to pay the calculated quarterly fee by check rather than by having it automatically deducted from their account.

Clients who implement through SEI Private Trust Company will pay other fees associated with their investments. Mutual fund expenses vary. At the time of implementation clients receive information specific to the fund expenses associated with the specific model. SEI also charges fees for specific transactions. As those fees may change per SEI's discretion, at the time of implementation clients will be provided with SEI's current fee schedule.

All contracts with clients are subject to termination by either Corrigan Wickman Advisory, LLC, or the client, with 30 days written notice. Any unearned fee is to be refunded on a pro-rated basis within three months of effective termination. Clients have 5 business days from the time they sign the agreement to terminate it for any reason and receive a full refund of any fees already paid.

Neither Corrigan Wickman Advisory, LLC, nor any of its supervised persons accept compensation for the sale of securities or other investment products, including asset-based sales charges or service fees from the sale of mutual funds.

Clients have the option to purchase investment products we recommend through other brokers or agents not affiliated with Corrigan Wickman Advisory, LLC.

Performance-Based Fees and Side-By-Side Management

Form ADV Part 2A, Item 6

No representative of Corrigan Wickman Advisory, LLC, accepts performance-based fees – that is, fees based on a share of capital gains on or capital appreciation of the assets of a client (such as a client that is a hedge fund or other pooled investment vehicle).

Types of Clients

Form ADV Part 2A, Item 7

Corrigan Wickman Advisory, LLC, primarily advises individuals, as well as trusts and estates, and small businesses. We have some clients who sponsor employer 401k and profit sharing plans. While very limited, we also advise charitable organizations. There are no minimum requirements for opening or maintaining an account.

Methods of Analysis, Investment Strategies and Risk of Loss

Form ADV Part 2A, Item 8

Corrigan Wickman Advisory, LLC, (the "Adviser") participates in The SEI Asset Allocation Program, which is offered to high net worth individuals, defined benefit plans, participant and non-participant directed defined contribution plans, institutions, endowments, and foundations.

With the SEI Asset Allocation Program, the Adviser serves as the investment adviser to the investor, and is responsible for analyzing the investor's current financial situation, return expectations, risk tolerance, time horizon, and asset class preference, pursuant to the Adviser's investment advisory agreement. Based upon the investor's information, the Adviser and the investor select an investment strategy and choose from one of many mutual fund asset allocation models, which may be provided by SEI Investments Management Corporation ("SIMC"), or purchase the individual mutual funds.

The Adviser will allocate the assets placed in the investor's account among the SEI Funds (a family of mutual funds advised by SIMC) in accordance with the investment strategy, goal or model selected by the investor. The investor, through the Adviser, may adjust their asset allocation to help ensure that the mix reflects the objectives of the chosen strategy. The investor may, at any time, impose reasonable restrictions on the management of his/her account or choose a new investment strategy. For participant-directed qualified retirement plans, assets will be invested in the SEI Asset Allocation mutual funds and other style-specific SEI Funds (if applicable).

SEI employs an active management approach. They design individual portfolios and modify the asset allocations in those portfolios in response to market changes. In addition, because they act as a manager of managers, they design and construct fund portfolios by evaluating and selecting independent investment managers to manage those fund portfolios according to their overall direction. SEI analysts continually monitor the philosophy, discipline, consistency and talent, checking portfolio holdings and trades, and ensuring the "purity" of the investment portfolio. For example, performance can suffer if managers invest outside of their assigned mandate. As a result of SEI's monitoring, managers who deviate from their philosophy or fail to achieve stated goals are subject to replacement. SEI's investment team also includes a separate risk management group of analysts to maintain objectivity and look at the entire spectrum of SEI's investment offerings to ensure risk objectives are being met.

Certain clients have custom (non-discretionary) models using SEI and non-SEI mutual funds and securities.

The SEI Funds are administered, distributed, and in some cases advised by SIMC or its affiliates for which it is paid fees as disclosed in the SEI Funds' prospectuses. The prospectus(es) should be read carefully by all investors before investing in the SEI Funds.

Although fees can at times be discounted, the typical fees payable to the Adviser are as follows:

<u>Value of Account(s)</u>	<u>Annual Fee</u>
Up to \$ 1,000,000	1.00%
Next \$ 2,000,000	.75%
Next \$ 2,000,000	.50%
Next \$ 5,000,000	.35%
Next \$10,000,000	.30%

Investing in securities involves a risk of loss that clients should be prepared to bear. The investment recommendations seek to limit risk through broad global diversification in equities (through broadly diversified stock mutual funds) and investment in fixed income securities or diversified bond funds. However, the investment methodology will still subject the client to declines in the value of their portfolios, which can at times be dramatic.

Corrigan Wickman Advisory, LLC, investment philosophy is best suited for investors who desire a buy and hold strategy and are focused on the long-term (minimum of ten years, and preferably even longer). Investing is inherently uncertain as to future returns. Corrigan Wickman Advisory, LLC, does not engage in market-timing activities and will never initiate sales or trades without prior consent from the client. We believe investment gains are generally more beneficial when investments are held over the long-term. However, there can be no assurance that these effects will occur over any given time period. While Corrigan Wickman Advisory, LLC, seeks to reduce non-compensated risks to which a client may be exposed, other risks (including but not limited to the risk of a general stock market decline) may be assumed in order to seek to attain the client's longer-term financial goals and objectives; however, Corrigan Wickman Advisory, LLC, cannot provide any guarantee that the client's goals and objectives will be achieved.

Certain securities recommended, such as U.S. small cap mutual funds and emerging market equity mutual funds, will experience higher levels of volatility. Corrigan Wickman Advisory, LLC, would only recommend these securities as part of an overall strategic asset allocation for a client. When such is undertaken Corrigan Wickman Advisory, LLC, possesses a reasonable belief that the risk-return relationship for these securities will likely be beneficial for the investor over the long term and is suitable to their investor profile based on a thorough risk assessment and conversations with the client.

While Corrigan Wickman Advisory, LLC, does not recommend the purchase or holding of individual common stocks, clients at times desire to retain certain existing holdings, or to purchase same. Reasons for clients' desires might include emotional ties to the stock and/or the presence of substantial unrealized capital gains, or other reasons. When individual common stocks (and related types of individual securities, such as American Depository Receipts) are held in a client's investment portfolio, the client remains exposed to "specific company risk". The client may also desire to hold individual corporate and/or municipal bonds. Individual Government bills, notes and bonds may also be included in client portfolios. All fixed income securities bear a risk of default, and such individual corporate and municipal bonds generally possess somewhat higher risks. If certificates of deposits are recommended to clients, it is our intent that clients hold the CDs to maturity and investments in one financial institution will not exceed FDIC limits.

Disciplinary Information

Form ADV Part 2A, Item 9

Neither Corrigan Wickman Advisory, LLC, nor any of its representatives have been involved in any of the following:

A. A criminal or civil action in a domestic, foreign or military court of competent jurisdiction in which your firm or a management person

1. was convicted of, or pled guilty or nolo contendere ("no contest") to (a) any felony; (b) a misdemeanor that involved investments or an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
2. is the named subject of a pending criminal proceeding that involves an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;
3. was found to have been involved in a violation of an investment-related statute or regulation; or
4. was the subject of any order, judgment, or decree permanently or temporarily enjoining, or otherwise limiting, your firm or a management person from engaging in any investment-related activity, or from violating any investment-related statute, rule, or order.

B. An administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority in which your firm or a management person

1. was found to have caused an investment-related business to lose its authorization to do business; or
2. was found to have been involved in a violation of an investment-related statute or regulation and was the subject of an order by the agency or authority
 - (a) denying, suspending, or revoking the authorization of your firm or a management person to act in an investment-related business;
 - (b) barring or suspending your firm's or a management person's association with an investment-related business;
 - (c) otherwise significantly limiting your firm's or a management person's investment-related activities; or
 - (d) imposing a civil money penalty of more than \$2,500 on your firm or a management person.

C. A self-regulatory organization (SRO) proceeding in which your firm or a management person

1. was found to have caused an investment-related business to lose its authorization to do business; or
2. was found to have been involved in a violation of the SRO's rules and was:
 - (i) barred or suspended from membership or from association with other members, or was expelled from membership;
 - (ii) otherwise significantly limited from investment-related activities; or
 - (iii) fined more than \$2,500.

Other Financial Industry Activities and Affiliations

Form ADV Part 2A, Item 10

- A. No representatives or management persons are registered, or have an application pending to register, as a broker-dealer or a registered representative of a broker-dealer.
- B. B. No representatives or management persons are registered, or have an application pending to register, as a futures commission merchant, commodity pool operator, a commodity trading advisor, or an associated person of the foregoing entities.
- C. Salespersons representing Corrigan Wickman Advisory, LLC, may be licensed with a variety of life and health insurance companies. When insurance implementation occurs, commissions may be generated which salespersons of Corrigan Wickman Advisory, LLC, receive. Thus, a conflict of interest exists between the interests of Corrigan Wickman Advisory, LLC, and those of our clients. Clients are under no obligation to purchase insurance through us or through these insurance companies. Additionally, Corrigan Wickman Advisory, LLC, and some of its salespersons hold Licensed Insurance Consultants licenses with the State of Oregon and may receive compensation for advice regarding insurance matters. We assist clients in finding insurance options that are in the best interest of the client. If the client already has a relationship with another agent or can find a comparable product at a lower price, we encourage and assist clients to explore those options.
- D. Mark Wickman serves on the Board of Directors for Northwest Christian Community Foundation (NCCF), and as part of that may serve on one or more committees, including the Investment Committee. NCCF helps people who want to further "Christian causes" through current and deferred gifts. Board members support this mission through setting policy and networking with clients and professionals to further the cause of NCCF. Clients who are searching for Donor Advised Fund options may be given information about NCCF, but are under no obligation to implement through NCCF. Furthermore, neither Corrigan Wickman Advisory, LLC, nor Mark Wickman receive any compensation or incentives from NCCF based on a client's choice to utilize NCCF's services. Any conflicts of interest are disclosed prior to implementation. Board meeting expenses, such as meeting facilities are covered by NCCF.

Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

Form ADV Part 2A, Item 11

All representatives of Corrigan Wickman Advisory, LLC, are committed to our clients. We will always:

- o *Act in the best interests of each and every client;*
- o *Act with integrity and dignity when dealing with clients, prospects, team members, and others; and*
- o *Seek at all times to preserve our firm's independence and to maintain our complete objectivity with respect to our advisory services and each recommendation made to our clients.*

Corrigan Wickman Advisory, LLC, is committed to ethical conduct. We seek to avoid material conflicts of interest. Accordingly, neither Corrigan Wickman Advisory, LLC, nor its investment adviser representatives receive any third party direct monetary compensation (*i.e.*, commissions, 12b-1 fees, or other fees) from brokerage firms (custodians) or mutual fund companies. However, some additional services and non-direct monetary or other forms of compensation are offered and provided to Corrigan Wickman Advisory, LLC, as a result of its relationships with custodian(s) and/or providers of mutual fund products. For example, Corrigan Wickman Advisory, LLC's investment advisors and employees may be invited to attend educational conferences and/or entertainment events sponsored by such brokerage firms or custodians or insurance companies. Corrigan Wickman Advisory, LLC, and/or its salespersons (and their spouses) may receive education, lodging, transportation, meals, leisure activities and related items/expenses in conjunction with sales and/or educational opportunities.

Although Corrigan Wickman Advisory, LLC, believes that its business methodologies, ethics rules, and adopted policies are appropriate to eliminate, or at least minimize, potential material conflicts of interest, and to manage appropriate any material conflicts of interest that may remain, clients should be aware that no set of rules can possibly anticipate or relieve all potential material conflicts of interest.

Corrigan Wickman Advisory, LLC, does not currently participate in securities in which it has a material financial interest. Corrigan Wickman Advisory, LLC, and its related persons, do not recommend to clients, or buy or sell for client accounts, securities in which the firm or its related persons has a material financial interest.

Representatives and related persons of Corrigan Wickman Advisory, LLC, may be invested in some of the same mutual funds as they recommend to clients; *i.e.* those offered through the Oregon College Savings plan and SEI Private Trust Company. Representatives of Corrigan Wickman Advisory, LLC, do not receive any monetary compensation from those investments other than those already disclosed in Item 5.

Corrigan Wickman Advisory, LLC, allows individuals associated with our firms to buy or sell securities for their personal accounts identical or different than those recommended to clients. However, no person employed by the Corrigan Wickman Advisory, LLC, will prefer his or her own interest to that of an advisory client nor make personal investment decisions based on investment decisions of advisory clients. We require that all individuals must act in accordance with all applicable Federal and State regulations governing registered investment advisory practices. Any individual not in observance of the above may be subject to discipline.

Brokerage Practices

Form ADV Part 2A, Item 12

Salespersons for Corrigan Wickman Advisory, LLC, may recommend brokers to clients for more efficient and/or less expensive transactions, or for reasons of non-financial relationships. In any event, clients are under no obligation to implement based on these recommendations. Corrigan Wickman Advisory, LLC, is not a representative of any broker-dealer and therefore receives no compensation when implementation occurs.

SEI Private Trust Company provides research materials; both SEI specific and industry related. Because SEI provides the materials and Corrigan Wickman Advisory, LLC, implements investment strategies through SEI, conceivably there could be a conflict of interest. Corrigan Wickman Advisory, LLC, uses that research in giving general investment advice and when appropriate that research impacts portfolio strategies that may be implemented by clients.

SEI Private Trust Company works through investment advisers. At times, they may refer clients to us. Corrigan Wickman Advisory, LLC, does not provide any compensation to SEI for these referrals. Nor is Corrigan Wickman Advisory, LLC, under any obligation to implement investments through SEI if a referral is made by to us by SEI.

Review of Accounts

Form ADV Part 2A, Item 13

Account reviews occur at least annually. We attempt to conduct formal Suitability Reviews annually.

Most managers engaged by us provide at least quarterly reports listing transactions, gains and losses. A suitability review is conducted to assess a client's risk tolerance, perception and attitude. We evaluate whether there have been any changes in risk categories or time horizon. As requested we provide information comparing client accounts to other funds, indices and/or benchmarks. Market overviews and manager outlooks may be included in reviews. There are three reviewers/salespersons. Salespersons may work together or independently and each are responsible for all accounts supervised by Corrigan Wickman Advisory, LLC.

We receive confirmations from SEI Private Trust Company on a daily basis. These confirmations are electronically reviewed and initialed by Maria Olsen. Ms. Olsen also conducts a bulk statement download from SEI on a monthly basis and reviews the summary of activity for each account.

Most of our clients meet with us more frequently than on an annual basis. Informal account reviews are usually conducted at each of those meetings (value, model, etc.) A client may contact us at anytime to discuss their portfolios and make changes as mutually agreed upon.

Clients receive either monthly or quarterly printed reports from managers and/or custodians. Quarterly reports often include performance evaluations.

Client Referrals and Other Compensation

Form ADV Part 2A, Item 14

Corrigan Wickman Advisory, LLC, will continue to avoid certain relationships with custodians (brokerage firms, etc.) and investment product providers which it believes might materially hamper its independence in its providing advice to its clients or result in clients paying higher mutual fund management, administrative, or other product-related fees and costs. For this and other reasons, Corrigan Wickman Advisory, LLC, does not participate in the client referral programs which may be sponsored by such custodians. Nor does Corrigan Wickman Advisory, LLC, currently recommend to their clients any mutual funds or ETFs manufactured by affiliates of such custodians.

Neither Corrigan Wickman Advisory, LLC, nor a related person directly or indirectly compensates any person who is not a supervised person for client referrals.

Custody

Form ADV Part 2A, Item 15

We have chosen to utilize independent qualified custodians for the safety of our clients' funds, such as SEI Private Trust Company. These qualified custodians provide separate monthly or quarterly statements, directly to our clients, detailing their account holdings. We also encourage each of our clients to carefully review the account statements received from the qualified custodian, and to compare those statements to any information provided by Corrigan Wickman Advisory, LLC.

Investment Discretion

Form ADV Part 2A, Item 16

We do not accept any discretionary authority to manage accounts on behalf of our clients. Before any account transactions are executed, Corrigan Wickman Advisory, LLC, receives a signature from the client(s).

Voting Client Securities

Form ADV Part 2A, Item 17

Corrigan Wickman Advisory, LLC, and its representatives have not, and will not accept, authority to vote client securities.

You will receive proxies and other solicitations directly from the custodian. You can contact us with questions regarding the solicitation. While we will not offer advice or recommendations on how to vote, we will explain the information contained within the solicitation if clients do not understand it.

Financial Information

Form ADV Part 2A, Item 18

We do not require or solicit prepayment of fees six-months or more in advance of the services performed; therefore there is no requirement to include any company fiscal year financial information in this section.

Corrigan Wickman Advisory, LLC, has not been the subject of a bankruptcy petition at any time during the past ten years.

Requirements for State-Registered Advisers

Form ADV Part 2A, Item 19

Principal executive officers and management persons are Daniel O. Corrigan and Mark D. Wickman. Specific information can be found in Form ADV 2B.

Salespersons for Corrigan Wickman Advisory, LLC, who give investment advice may also be licensed to sell insurance products. They also provide financial planning services. Additionally, speaking engagements and the sale of concepts (including books) generate revenues. Corrigan Wickman Advisory, LLC, salespersons spend 75% of their time selling insurance products, providing financial planning services, providing business, organizational and family consultation to clients, public speaking and selling concepts (including books).

No representatives of Corrigan Wickman Advisory, LLC, are compensated with performance-based fees.

Neither Corrigan Wickman Advisory, LLC, nor any of its representatives have been involved in any of the events listed below:

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - (a) an investment or an investment-related business or activity;
 - (b) fraud, false statement(s), or omissions;
 - (c) theft, embezzlement, or other wrongful taking of property;
 - (d) bribery, forgery, counterfeiting, or extortion; or
 - (e) dishonest, unfair, or unethical practices.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - (a) an investment or an investment-related business or activity;
 - (b) fraud, false statement(s), or omissions;
 - (c) theft, embezzlement, or other wrongful taking of property;
 - (d) bribery, forgery, counterfeiting, or extortion; or
 - (e) dishonest, unfair, or unethical practices.

No relationships, other than those described in Item 10.c of Part 2A, exist.

Additional Information

Salespersons conduct seminars for professionals in the financial services industry. Speaking fees range from \$100 to \$5,000 per day. Conceptual packets are also sold to these professionals. Concepts and books are sold for \$3-\$100 each. Public seminars are conducted for which a fee may be charged by Corrigan Wickman Advisory, LLC. Fees may be charged to attendees at public seminars/informational meetings. Some such seminars/meetings are offered free of charge. The concepts and books referred to above may be sold at these seminars as well.

Corrigan Wickman Advisory, LLC, and/or its salespersons (and their spouses) may receive education, lodging, transportation, meals, leisure activities and related items/expenses in conjunction with sales and/or educational opportunities presented by other investment advisors, custodians or insurance companies.

Daniel O. Corrigan

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3/31/2011

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Daniel O. Corrigan that supplements the Corrigan Wickman Advisory, LLC, brochure. You should have received a copy of that brochure. Please contact Maria Olsen at (971) 241-5378 if you did not receive Corrigan Wickman Advisory LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Daniel O. Corrigan is available on the SEC's website at www.adviserinfo.sec.gov.

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Educational Background and Business Experience

Form ADV Part 2B, Item 2

Daniel O. Corrigan

Year of Birth: 1939

Formal Education after High School:

- University of Portland, 1957-1961
- Linfield College, 1975-1976

:

Business Background for the Previous Five Years:

- Corrigan Wickman Advisory, LLC (and its predecessors), Owner, 01/1971-Present

Certifications:

- N/A

Disciplinary Information

Form ADV Part 2B, Item 3

Daniel O. Corrigan has **not** been involved in any of the following:

- A. A criminal or civil action in a domestic, foreign or military court of competent jurisdiction in which the supervised person
 - 1. was convicted of, or pled guilty or nolo contendere (“no contest”) to (a) any felony; (b) a misdemeanor that involved investments or an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
 - 2. is the named subject of a pending criminal proceeding that involves an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;
 - 3. was found to have been involved in a violation of an investment-related statute or regulation; or
 - 4. was the subject of any order, judgment, or decree permanently or temporarily enjoining, or otherwise limiting, the supervised person from engaging in any investment-related activity, or from violating any investment-related statute, rule, or order.
- B. An administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority in which the supervised person
 - 1. was found to have caused an investment-related business to lose its authorization to do business; or
 - 2. was found to have been involved in a violation of an investment-related statute or regulation and was the subject of an order by the agency or authority
 - (a) denying, suspending, or revoking the authorization of the supervised person to act in an investment-related business;
 - (b) barring or suspending the supervised person's association with an investment-related business;
 - (c) otherwise significantly limiting the supervised person's investment-related activities; or
 - (d) imposing a civil money penalty of more than \$2,500 on the supervised person.
- C. A self-regulatory organization (SRO) proceeding in which the supervised person
 - 1. was found to have caused an investment-related business to lose its authorization to do business; or
 - 2. was found to have been involved in a violation of the SRO's rules and was: (i) barred or suspended from membership or from association with other members, or was expelled from membership; (ii) otherwise significantly limited from investment-related activities; or (iii) fined more than \$2,500.
- D. Any other proceeding in which a professional attainment, designation, or license of the supervised person was revoked or suspended because of a violation of rules relating to professional conduct.

Other Business Activities

Form ADV Part 2B, Item 4

Daniel O. Corrigan is licensed with the State of Oregon as a life and health insurance agent and consultant. When insurance implementation occurs, commissions may be generated which Mr. Corrigan receives. Thus, a conflict of interest exists between the interest of Mr. Corrigan, and those of his clients. Clients are under no obligation to purchase insurance through Mr. Corrigan or through any of the insurance companies he recommends. He may receive other compensation for advice regarding insurance matters. When assisting clients in finding insurance options it is always in the best interest of the client. If the client already has a relationship with another agent or can find a comparable product at a lower price, he encourages and assists clients to explore those options.

Mr. Corrigan conducts seminars for professionals in the financial services industry. Speaking fees range from \$100 to \$5,000 per day. Conceptual packets are also sold to these professionals. Concepts and books are sold for \$3-\$100 each. Public seminars are conducted for which no fee is charged by Corrigan Wickman Advisory, LLC. The concepts and books referred to above may be sold at these seminars as well.

Daniel O. Corrigan is not actively engaged in any business or occupation for compensation not discussed in response to Item 4.A, above.

Additional Compensation

Form ADV Part 2B, Item 5

At times, Daniel O. Corrigan receives some additional services and non-direct monetary or other forms of compensation as a result of his relationships with custodian(s) and/or providers of mutual fund products. For example, Mr. Corrigan may be invited to attend educational conferences and/or entertainment events sponsored by such brokerage firms or custodians or insurance companies. He (and his spouse) may receive education, lodging, transportation, meals, leisure activities and related items/expenses in conjunction with sales and/or educational opportunities. He also receives marketing support and research materials.

Supervision

Form ADV Part 2B, Item 6

Daniel O. Corrigan is not supervised by any other representative of Corrigan Wickman Advisory, LLC. Corrigan Wickman Advisory, LLC, approaches client services with a team approach and the team is active in all advisory activities.

Requirements for State-Registered Advisers

Form ADV Part 2B, Item 7

A. Daniel O. Corrigan has **not** been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:

- (a) an investment or an investment-related business or activity;
- (b) fraud, false statement(s), or omissions;
- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:

- (a) an investment or an investment-related business or activity;
- (b) fraud, false statement(s), or omissions;
- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

B. Daniel O. Corrigan has **not** been the subject of a bankruptcy petition.

Maria E. Olsen

CORRIGAN WICKMAN ADVISORY, LLC

**400 NE 2nd STREET
PO BOX 648
McMINNVILLE, OR 97128**

(503) 472-4631

Fax (503) 472-6992

www.well-thplanning.com

3/31/2011

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Maria E. Olsen that supplements the Corrigan Wickman Advisory, LLC, brochure. You should have received a copy of that brochure. Please contact Maria Olsen at (971) 241-5378 if you did not receive Corrigan Wickman Advisory LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Maria E. Olsen is available on the SEC's website at www.adviserinfo.sec.gov.

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Educational Background and Business Experience

Form ADV Part 2B, Item 2

Maria E. Olsen

Year of Birth: 1969

Formal Education after High School:

- Chemeketa Community College, general, 1989-1991
- Azusa Pacific University, general, 1991-1992
- Linfield College, Human Resources Certification, 2001-2002
- Uniform Investment Adviser Law, Series 65, 11/05/2007
- University of Pittsburgh-Bradford, Sociology, presently

Business Background for the Previous Five Years:

- First Federal Savings & Loan, 07/2000-07/2004
Corrigan Wickman Advisory, LLC (and its predecessors), 07/2004-Present

Certifications:

- N/A

Disciplinary Information

Form ADV Part 2B, Item 3

Maria E. Olsen has ***not*** been involved in any of the following:

- A. A criminal or civil action in a domestic, foreign or military court of competent jurisdiction in which the supervised person
 - 1. was convicted of, or pled guilty or nolo contendere (“no contest”) to (a) any felony; (b) a misdemeanor that involved investments or an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
 - 2. is the named subject of a pending criminal proceeding that involves an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;
 - 3. was found to have been involved in a violation of an investment-related statute or regulation; or
 - 4. was the subject of any order, judgment, or decree permanently or temporarily enjoining, or otherwise limiting, the supervised person from engaging in any investment-related activity, or from violating any investment-related statute, rule, or order.
- B. An administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority in which the supervised person
 - 1. was found to have caused an investment-related business to lose its authorization to do business; or
 - 2. was found to have been involved in a violation of an investment-related statute or regulation and was the subject of an order by the agency or authority
 - (a) denying, suspending, or revoking the authorization of the supervised person to act in an investment-related business;
 - (b) barring or suspending the supervised person's association with an investment-related business;
 - (c) otherwise significantly limiting the supervised person's investment-related activities; or
 - (d) imposing a civil money penalty of more than \$2,500 on the supervised person.
- C. A self-regulatory organization (SRO) proceeding in which the supervised person
 - 1. was found to have caused an investment-related business to lose its authorization to do business; or
 - 2. was found to have been involved in a violation of the SRO's rules and was: (i) barred or suspended from membership or from association with other members, or was expelled from membership; (ii) otherwise significantly limited from investment-related activities; or (iii) fined more than \$2,500.
- D. Any other proceeding in which a professional attainment, designation, or license of the supervised person was revoked or suspended because of a violation of rules relating to professional conduct.

Other Business Activities

Form ADV Part 2B, Item 4

- A. Maria E. Olsen is not actively engaged in any investment-related business or occupation outside of her employment with Corrigan Wickman Advisory, LLC. She is not registered, or does not have an application pending to register, as a broker-dealer, registered representative of a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or an associated person of an FCM, CPO, or CTA. Therefore, no material conflict of interest exists with clients.

Maria E. Olsen does not receive commissions, bonuses or other compensation based on the sale of securities or other investment products, including as a broker-dealer or registered representative, and including distribution or service ("trail") fees from the sale of mutual funds.

- B. Maria E. Olsen is not actively engaged in any business or occupation for compensation not discussed in response to Item 4.A, above.

Additional Compensation

Form ADV Part 2B, Item 5

At times, Maria E. Olsen receives some additional services and non-direct monetary or other forms of compensation as a result of her relationships with custodian(s) and/or providers of mutual fund products. For example, Ms. Olsen may be invited to attend educational conferences and/or entertainment events sponsored by such brokerage firms or custodians or insurance companies. She (and her spouse) may receive education, lodging, transportation, meals, leisure activities and related items/expenses in conjunction with sales and/or educational opportunities. She also receives marketing support and research materials.

Supervision

Form ADV Part 2B, Item 6

Maria E. Olsen is not supervised by any other representative of Corrigan Wickman Advisory, LLC. Corrigan Wickman Advisory, LLC, approaches client services with a team approach and the team is active in all advisory activities.

Requirements for State-Registered Advisers

Form ADV Part 2B, Item 7

A. Maria E. Olsen has **not** been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:

- (a) an investment or an investment-related business or activity;
- (b) fraud, false statement(s), or omissions;
- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:

- (a) an investment or an investment-related business or activity;
- (b) fraud, false statement(s), or omissions;
- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

B. Maria E. Olsen has **not** been the subject of a bankruptcy petition.

Thomas C. Paterson

CORRIGAN WICKMAN ADVISORY, LLC

**400 NE 2nd STREET
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McMINNVILLE, OR 97128**

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07/21/2011

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

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Additional information about Thomas C. Paterson is available on the SEC's website at www.adviserinfo.sec.gov.

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Educational Background and Business Experience

Form ADV Part 2B, Item 2

Thomas C. Paterson

Year of Birth: 1982

Formal Education after High School:

- Linfield College, B.S., Finance, 2005

:

Business Background for the Previous Five Years:

- Starbucks, 07/2006-02/2007
- Chicago White Sox, 02/2007-05/2007
- Merrill Lynch, 05/2007-07/2011
- Bank of America, 11/2009-07/2011
- Corrigan Wickman Advisory, LLC, 07/2011-Present

Certifications:

- N/A

Disciplinary Information

Form ADV Part 2B, Item 3

Thomas C. Paterson has **not** been involved in any of the following:

- A. A criminal or civil action in a domestic, foreign or military court of competent jurisdiction in which the supervised person
 - 1. was convicted of, or pled guilty or nolo contendere ("no contest") to (a) any felony; (b) a misdemeanor that involved investments or an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
 - 2. is the named subject of a pending criminal proceeding that involves an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;
 - 3. was found to have been involved in a violation of an investment-related statute or regulation; or
 - 4. was the subject of any order, judgment, or decree permanently or temporarily enjoining, or otherwise limiting, the supervised person from engaging in any investment-related activity, or from violating any investment-related statute, rule, or order.
- B. An administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority in which the supervised person
 - 1. was found to have caused an investment-related business to lose its authorization to do business; or
 - 2. was found to have been involved in a violation of an investment-related statute or regulation and was the subject of an order by the agency or authority
 - (a) denying, suspending, or revoking the authorization of the supervised person to act in an investment-related business;
 - (b) barring or suspending the supervised person's association with an investment-related business;
 - (c) otherwise significantly limiting the supervised person's investment-related activities; or
 - (d) imposing a civil money penalty of more than \$2,500 on the supervised person.
- C. A self-regulatory organization (SRO) proceeding in which the supervised person
 - 1. was found to have caused an investment-related business to lose its authorization to do business; or
 - 2. was found to have been involved in a violation of the SRO's rules and was: (i) barred or suspended from membership or from association with other members, or was expelled from membership; (ii) otherwise significantly limited from investment-related activities; or (iii) fined more than \$2,500.
- D. Any other proceeding in which a professional attainment, designation, or license of the supervised person was revoked or suspended because of a violation of rules relating to professional conduct.

Other Business Activities

Form ADV Part 2B, Item 4

A. Thomas C. Paterson is licensed with the State of Oregon as a life and health insurance agent and consultant. When insurance implementation occurs, commissions may be generated which Mr. Paterson receives. Thus, a conflict of interest exists between the interest of Mr. Paterson, and those of his clients. Clients are under no obligation to purchase insurance through Mr. Paterson or through any of the insurance companies he recommends. He may receive other compensation for advice regarding insurance matters. When assisting clients in finding insurance options it is always in the best interest of the client. If the client already has a relationship with another agent or can find a comparable product at a lower price, he encourages and assists clients to explore those options.

B. Thomas C. Paterson is not actively engaged in any business or occupation for compensation not discussed in response to Item 4.A, above.

Additional Compensation

Form ADV Part 2B, Item 5

At times, Thomas C. Paterson receives some additional services and non-direct monetary or other forms of compensation as a result of his relationships with custodian(s) and/or providers of mutual fund products. For example, Mr. Paterson may be invited to attend educational conferences and/or entertainment events sponsored by such brokerage firms or custodians or insurance companies. He (and his spouse) may receive education, lodging, transportation, meals, leisure activities and related items/expenses in conjunction with sales and/or educational opportunities. He also receives marketing support and research materials.

Supervision

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Requirements for State-Registered Advisers

Form ADV Part 2B, Item 7

A. Thomas C. Paterson has **not** been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:

- (a) an investment or an investment-related business or activity;
- (b) fraud, false statement(s), or omissions;
- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:

- (a) an investment or an investment-related business or activity;
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- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

B. Thomas C. Paterson has **not** been the subject of a bankruptcy petition.

Mark D. Wickman

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McMINNVILLE, OR 97128**

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3/31/2011

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

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Additional information about Mark D. Wickman is available on the SEC's website at www.adviserinfo.sec.gov.

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Educational Background and Business Experience

Form ADV Part 2B, Item 2

Mark D. Wickman

Year of Birth: 1956

Formal Education after High School:

- Linfield College, B.A., Sociology, 1978
- Linfield College, M.Ed., Math Education, 1989

Business Background for the Previous Five Years:

- Corrigan Wickman Advisory, LLC (and its predecessors), Owner, 08/1995 - Present

Certifications:

- CFP®

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education** – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination** – Pass the comprehensive CFP® Certification Examination. The examination required successful completion of 5 exams over a two year period, including case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience** – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics** – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education** – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics** – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP®.

Disciplinary Information

Form ADV Part 2B, Item 3

Mark D. Wickman has ***not*** been involved in any of the following:

- A. A criminal or civil action in a domestic, foreign or military court of competent jurisdiction in which the supervised person
 - 1. was convicted of, or pled guilty or nolo contendere (“no contest”) to (a) any felony; (b) a misdemeanor that involved investments or an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
 - 2. is the named subject of a pending criminal proceeding that involves an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;
 - 3. was found to have been involved in a violation of an investment-related statute or regulation; or
 - 4. was the subject of any order, judgment, or decree permanently or temporarily enjoining, or otherwise limiting, the supervised person from engaging in any investment-related activity, or from violating any investment-related statute, rule, or order.
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Mr. Wickman may conduct seminars for professionals in the financial services industry. Speaking fees range from \$100 to \$5,000 per day. Books may be sold to these professionals. Books are sold for \$10 each. Public seminars are conducted for which no fee is charged by Corrigan Wickman Advisory, LLC. The books referred to above may be sold at these seminars as well.

Mark D. Wickman is not actively engaged in any business or occupation for compensation not discussed in response to Item 4.A, above.

Additional Compensation

Form ADV Part 2B, Item 5

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Supervision

Form ADV Part 2B, Item 6

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Requirements for State-Registered Advisers

Form ADV Part 2B, Item 7

A. Mark D. Wickman has **not** been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:

- (a) an investment or an investment-related business or activity;
- (b) fraud, false statement(s), or omissions;
- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:

- (a) an investment or an investment-related business or activity;
- (b) fraud, false statement(s), or omissions;
- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

B. Mark D. Wickman has **not** been the subject of a bankruptcy petition.