

Wealth & Wellness Group

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Wealth & Wellness Group

1. Form ADV Part 2B Brochure Supplement for Robert Laura

Address: 690 Hope Street
Suite B
Brighton, MI 48116

Phone: (888) 267-1138

Website: <https://wealthandwellnessgroup.com/>

This brochure supplement provides information about Robert Laura that supplements the Wealth & Wellness Group brochure. You should have received a copy of that brochure. Please contact Wealth & Wellness Group if you did not receive Wealth & Wellness Group's brochure or if you have any questions about the contents of this supplement.

Additional information about Robert Laura is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 4153364.

Item 2: Educational Background & Business Experience

Full Name: Robert Steven Laura

Year of Birth: 1972

Education: Bachelor of Science
Eastern Michigan University
1995

Business Background: Member/IAR
Wealth & Wellness Group, LLC
December 2009 – Present/September 2025 – Present

Member
Laura Investment Properties, LLC
April 2024 – Present

Member
Retirement Project LLC
June 2010 – Present

Member/IAR
Synergos Financial Group,
L.L.C. dba Wealth &
Wellness Group
December 2009 to Present

SVP Wealth Management
First National Bank
November 2009 – November 2024

Professional Designations¹: Accredited Asset Management Specialist (AAMS)

Certified Kingdom Advisor (CKA)

Certified Mutual Fund Counselor (CMFC)

Certified Professional Retirement Coach (CPRC)

Chartered Retirement Planning Counselor (CRPC)

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Robert Laura.

Item 4: Other Business Activities

- A. Robert Laura is a Member of Laura Investment Properties, LLC, which owns an office building real estate rental. He spends approximately 2-3 hours per month on this activity.
- B. Robert Laura is also a member of Retirement Project LLC, a non-investment-related educational organization. He spends approximately 20-25 hours per month on this activity

- C. Robert Laura is dually registered as an investment adviser representative of Synergos Financial Group, L.L.C. dba Wealth & Wellness Group ("Synergos"). He will only remain dually registered during the conversion of his book of business from Synergos to the new RIA Wealth & Wellness Group, LLC. This is not a conflict of interest as he will not recommend advisory services to the firm's clients through Synergos.

Item 5: Additional Compensation

Robert Laura does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through Wealth & Wellness Group.

Item 6: Supervision

Robert Laura is supervised and monitored by Robert Laura, Chief Compliance Officer, pursuant to Wealth & Wellness Group's written policies and procedures and code of ethics. Robert Laura may be reached using the contact information on the cover page of this brochure supplement.

Item 7: Requirements for State-Registered Advisers

A. Robert Laura 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. Robert Laura has **NOT** been the subject of a bankruptcy petition.

Exhibit A: Professional Designation Descriptions

Accredited Asset Management Specialist (AAMS)

Prerequisites

None

Designation Training Requirements

- Online self-study AAMS course and exam to be completed within 120 days of receiving program access; instructor-led option based on availability

Designation Exam Type

- Online, closed-book final exam

Continuing Education Requirements

- 16 hours every two years

Certified Kingdom Advisor (CKA)

Prerequisites

Candidates must have:

- A letter of reference from a pastor or member of pastoral staff; and
- Two client references.

Additional prerequisites vary by discipline:

- Accountant: CPA, EA
- Attorney: JD
- Financial Planner: CFP, ChFC or CPA/PFS designation or have 10 years of full-time financial-planning experience.
- Insurance Professional: CLU, FIC or 10 years of full-time experience practicing with clients in this discipline
- Investment Professional: CFP, ChFC, CPA/PFS, CFA, CIMA, AAMS designation or have 10 years of full-time experience practicing with clients in this discipline.

Designation Training Requirements

- Complete CKA® Educational Program

Designation Exam Type

- Final proctored, closed book certification exam

Continuing Education Requirements

- 10 hours per year

Certified Mutual Fund Counselor (CMFC)

Prerequisites

None

Designation Training Requirements

- Self-study course

Designation Exam Type

- Online final exam

Continuing Education Requirements

- 16 hours every two years

Certified Professional Retirement Coach (CPRC)

Prerequisites

None

Designation Training Requirements

- Online self-study CRPC course and exam to be completed within 120 days of receiving program access; instructor-led option based on availability

Designation Exam Type

- Online, closed-book final exam

Continuing Education Requirements

- 16 hours every two years

Chartered Retirement Planning Counselor (CRPC)

Prerequisites

None

Designation Training Requirements

- Online self-study CRPC course and exam to be completed within 120 days of receiving program access; instructor-led option based on availability

Designation Exam Type

- Online, closed-book final exam

Continuing Education Requirements

- 16 hours every two years