

**Wealth & Wellness Group  
Form ADV Part 2B  
Brochure Supplement for Robert Laura**

690 Hope St, Suite B.  
Brighton, MI 48116  
888-267-1138

Email: bob.laura@wealthandwellnessgroup.com

[WealthandWellnessGroup.com](http://WealthandWellnessGroup.com)

# **Table of Contents**

---

## **Wealth & Wellness Group**

### **Form ADV Part 2B Brochure Supplement for Robert Laura**

Item 1: Cover Page_____	2
Item 2: Educational Background and Business Experience_____	3
Item 3: Disciplinary Information_____	3
Item 4: Other Business Activities_____	4
Item 5: Additional Compensation_____	4
Item 6: Disciplinary Information_____	4
Item 7: Requirements for State-Registered Advisors_____	4
Exhibit A: Professional Designation Descriptions_____	5

## **Item 1: Cover Page**

---

### **Wealth & Wellness Group Form ADV Part 2B Brochure Supplement for Robert Laura**

Address: 690 Hope Street Suite B  
Brighton, MI 48116

Phone: (888) 267-1138

Email: bob.laura@wealthandwellnessgroup.com

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](http://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  
Laura Investment Properties, LLC April 2024 – Present

Member  
Retirement Project LLC June 2010 – Present

Member, Senior Advisor  
Wealth and Wellness Group September 2025 – Present

Member, Senior Advisor  
Synergos Financial Group / Osborn Wealth Management  
December 2009 – January 2026

SVP, Trust & Investment Services  
First National Bank in Howell Sept 2004 – 2009

Professional Designations Accredited Asset Management Specialist (AAMS)

Certified Kingdom Advisor (CKA)

Chartered 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**

Robert Laura is a Member of Laura Investment Properties, LLC, which owns an office building for real estate rental. He spends approximately 2-3 hours per month on this activity.

Robert Laura is also a member of Retirement Project LLC, a non-investment-related educational organization focused on the personal aspects of the retirement transition. He spends approximately 20-25 hours per month on this activity.

These activities are separate from advisory services provided through Wealth & Wellness Group. Clients are under no obligation to utilize services offered through Retirement Project LLC, and no advisory client is required to participate in any related educational programs. Mr. Laura seeks to allocate his time in a manner that does not interfere with his obligations to advisory clients.

## **Item 5: Additional Compensation**

Robert Laura does not receive commissions, referral fees, or any other form of compensation from third parties in connection with advisory services.

## **Item 6: Supervision**

As Chief Compliance Officer, Mr. Laura is responsible for administering the firm's compliance policies and procedures. The firm conducts periodic reviews of client accounts, trading activity, communications, and advisory practices pursuant to its written supervisory procedures and Code of Ethics.

Wealth & Wellness Group is a closely held firm and Mr. Laura is the sole advisory professional. He may be reached using the contact information on the cover page of this brochure supplement.

## **Item 7: Requirements for State-Registered Advisers**

Robert Laura has not been involved in any of the events required to be disclosed in this Item 7, including any award or liability as part of arbitration, civil proceeding, self-regulatory organization proceeding, or administrative proceeding. Nor has Robert Laura 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

*Additional information regarding this professional designation is available upon request.*

## **Certified Kingdom Advisor (CKA)**

### 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

*Additional information regarding this professional designation is available upon request*

## **Chartered Mutual Fund Counselor (CMFC)**

### Prerequisites:

None

### Designation Training Requirements

Online self-study CMFC 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

*Additional information regarding this professional designation is available upon request.*

## **Certified Professional Retirement Coach (CPRC)**

### Prerequisites:

None

### Designation Training Requirements

Online self-study CPRC course

### Designation Exam Type

Online, closed-book final exam

### Continuing Education Requirements

10 hours every year

*Additional information regarding this professional designation is available upon request.*

## **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

*Additional information regarding this professional designation is available upon request.*