

*This brochure supplement provides information about Nicholas Errold Nelson that supplements the SHP Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Nicholas Errold Nelson if you did not receive SHP Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Nicholas Errold Nelson is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **SHP Wealth Management, LLC**

Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Nicholas Errold Nelson**

Personal CRD Number: 6209581

Investment Adviser Representative

SHP Wealth Management, LLC  
225 Water St, Suite c210  
Plymouth, MA 02360  
(508) 746-2400  
[nickn@shpne.com](mailto:nickn@shpne.com)

UPDATED: 04/17/2018

## Item 2: Educational Background and Business Experience

**Name:** Nicholas Errold Nelson

**Born:** 1991

### **Educational Background and Professional Designations:**

#### **Education:**

Bachelors of Science Business Administration, Saint Michaels College - 2014

#### **Business Background:**

06/2016 - Present	Investment Adviser Representative SHP Wealth Management, LLC
07/2015 - 06/2016	Registered Representative Principal Life Insurance Company
10/2015 - 06/2016	Financial Representative Quail Financial Group
07/2015 - 06/2016	Registered Representative Princor Financial Services Corporation
11/2014 - 07/2015	Registered Representative Purshe Kaplan Sterling Investments
10/2014 - 07/2015	Financial Advisor McAdam, LLC
06/2014 - 10/2014	Registered Representative ING Financial Partners
05/2014 - 10/2014	Associate McAdam Financial Group
08/2010 - 05/2014	Student Saint Michaels College

05/2010 - 08/2011	Life guard Town of Chesterfield
09/2006 - 06/2010	Student Keene High School
09/2000 - 06/2006	Student Chesterfield Elementary School

### **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**

Nicholas Errold Nelson is an independent licensed insurance agent, SHP Financial, and from time to time, will offer clients advice or products from those activities. Clients should be aware that these services pay a commission or other compensation and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. SWML always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services of any representative of SWML in connection with such individual's activities outside of SWML.

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

Nicholas Errold Nelson does not receive any economic benefit from any person, company, or organization, other than SHP Wealth Management, LLC in exchange for providing clients advisory services through SHP Wealth Management, LLC.

### **Item 6: Supervision**

As a representative of SHP Wealth Management, LLC, Nicholas Errold Nelson is supervised by Michelle Short, the firm's Chief Compliance officer. Michelle Short is responsible for ensuring that Nicholas Errold Nelson 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 Michelle Short is (508) 746-2400.