

**Form ADV Part 2B
Disclosure Brochure Supplement**

for

P. Jeffrey Christakos

Westfield Wealth Management, LLC

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This brochure supplement provides information about P. Jeffrey Christakos that supplements the Westfield Wealth Management, LLC disclosure brochure. You should have received a copy of that brochure. Please contact Jeff Christakos if you did not receive Westfield Wealth Management, LLC's disclosure brochure or if you have any questions about the contents of this supplement.

Additional information about P. Jeffrey Christakos is available on the SEC's web site at www.adviserinfo.sec.gov.

Item 2. Educational Background and Business Experience

Name: P. Jeffrey Christakos, CPA/PFS, CFP, CLU, AIF

Born: 1958

Education

Union College – AA Public Administration, 1977

Seton Hall University – BS Accounting, 1978

Fairleigh Dickinson – MBA Finance, 1985

Recent Business Background

- January 2016 to Present: Specialist Professor of Accounting; Monmouth University
- January 2000 to Present: President, Westfield Wealth Management, LLC
- August 1988 to Present: Partner, Christakos & Co.
- January 2015 to December 2016; Instructor for financial planning and tax courses, Localzo (previously Nichols Patrick CPE, Inc.)
- October 2010 to December 2015; Senior Advisor, Westfield Benefit Services, LLC
- March 2003 to December 2015: Registered Principal, United Planners Financial Services

Professional Designations

CPA—Certified Public Accountant

In order to become a CPA in the United States, the candidate must sit for and pass the Uniform Certified Public Accountant Examination established by the American Institute of Certified Public Accountants (AICPA). Eligibility to sit for the Uniform CPA Exam is determined by individual State Boards of Accountancy and typically includes a minimum number of qualifying credit hours in accounting and business administration plus one additional year of study. Specific licensing and certification requirements beyond the uniform CPA examination are set by each state's laws and may vary from state to state.

Typical state requirements include an experience component, an ethics component and a continuing professional education component, which must be fulfilled to maintain the CPA license.

PFS—Personal Financial Specialist

Candidates for the PFS designation must first be CPAs. The CPA credential, in and of itself, implies a great deal of education, experience and technical skill. Furthermore, a CPA/PFS must:

- Be an AICPA member in good standing and agree to comply with continuing professional education and reaccreditation requirements.
- Have at least three years of personal financial planning experience, which must be documented with letters from clients and peers.
- Demonstrate special competence by passing a rigorous two-and-a-half day financial planning examination.

Once a CPA earns the PFS designation, he or she must work to keep it by becoming reaccredited every three years. This process includes taking continuing professional education to stay abreast of the latest developments.

In addition, CPAs with the PFS designation must periodically evaluate and document the professional quality of their practices to ensure that they meet the highest standards of professionalism and integrity. The CPA/PFS must also continue to practice personal financial planning. If the nature of the CPA's practice changes and the number of financial planning hours drops below the minimum required, the CPA will lose the PFS designation.

CFP®-- Certified Financial Planner

CFP® MINIMUM QUALIFICATIONS:

The Certified Financial Planner (CFP®) designation is a professional certification mark for financial planners conferred by the Certified Financial Planner Board of Standards, Inc. (CFP Board). To receive authorization to use the designation, the candidate must meet education, examination, experience and ethics requirements, and meet ongoing certification requirements, as follows:

- Bachelor's degree or its equivalent, in any discipline, from an accredited university
- Minimum 15-hour curriculum necessary to prepare for the CFP exam (you may challenge the educational requirements if you are a licensed attorney or are hold any of the following certifications or degrees: Certified Public Accountant, Chartered Financial Analyst, Chartered Financial Consultant, Chartered Life Underwriter, Doctor of Business Administration or PhD in business or economics)
- Apply for and achieve a passing score on the Certified Financial Planner exam
- Possess at least 3 years of work experience in the financial planning industry - teaching, assisting, supervising or delivering financial planning services to a client base for a minimum of 3 years prior to certification
- Pass a background check and candidate fitness standards test. You must reveal any criminal history, pending litigation or ethical violations. The CFP board verifies all employment history, qualifications and disciplinary issues via FINRA's Central Registration Depository.

CLU®--Chartered Life Underwriter

CLU® MINIMUM QUALIFICATIONS:

A professional designation for individuals who wish to specialize in life insurance and estate planning. Individuals must complete five core courses and three elective courses, and successfully pass all eight two-hour, 100-question examinations in order to receive the designation. Additionally, candidates must have three years of relevant full-time business experience within the five years preceding the date of the award. Candidates must also meet ethics standards and agree to comply with the American College Code of Ethics and Procedures. Candidates matriculating after June 30, 1989 who fall into specified categories are also required to earn 30 hours of continuing education credits every two years.

AIF®--Accredited Investment Fiduciary

Fiduciary 360 (fi360) provides fiduciary education; professional designations and support; and analytical, reporting and client management technology which are designed to support the fi360 Prudent Practices. The Accredited Investment Fiduciary® (AIF) designation is designed to educate investment fiduciaries on fi360's Prudent Practices, their legal underpinnings and how to apply them within existing fiduciary policies and procedures.

The AIF Training curriculum is offered in distance education or a blended learning option to suit each student's needs. Each format culminates in the 60 question AIF examination, which must be passed with 75% correct answers in order to file for the AIF designation. After passing the exam, a student wishing to file for the AIF Designation must submit the accreditation application and accreditation fee.

In order to earn and maintain the AIF Designation, individuals must also fulfill the following requirements:

- Meet prerequisite requirements through a sufficient combination of experience, education, licensing, and/or industry credentials.
- Attest to the AIF Code of Ethics.
- Comply with the AIF qualification and conduct standards.
- Accrue six hours of continuing professional education each renewal year with at least four coming from fi360-produced sources.

- Maintain current contact information in fi360's designee database.

Item 3. Disciplinary Information

P. Jeffrey Christakos has not been involved in any legal or disciplinary events that are material to a client's evaluation of him or his integrity.

Item 4. Other Business Activities

P. Jeffrey Christakos is Partner of Christakos & Co., an accounting firm. Common ownership exists between the accounting firm and WWM. Representatives of WWM may from time to time refer accounting and tax issues to the CPA Firm, and in turn the CPA Firm may refer some accounting and tax clients to WWM for advisory services. This arrangement does not present any conflict of interest with respect to the client. WWM advisory clients are not obligated to use the services of Christakos & Co., Inc. and are always free to use the accountant/accounting firm of their choice.

Item 5. Additional Compensation

P. Jeffrey Christakos does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through WWM.

Item 6. Supervision

As owner and designated principal of WWM, P. Jeffrey Christakos has ultimate and direct supervisory responsibility over all personnel and functional areas of WWM. Mr. Christakos regularly reviews required reports and activities of WWM personnel for compliance with applicable requirements.

Item 7. Requirements for State Advisors

The following information is required by the State of New Jersey. In addition to any events that may be listed in Item 3 of this brochure, we must disclose if P. Jeffrey Christakos has been involved certain arbitration claims, been found liable in a certain civil, self-regulatory organization, or administrative proceedings, or has been the subject of a bankruptcy petition. Mr. Christakos has nothing to disclose in these areas.