

**ITEM 1: COVER PAGE FOR PART 2B OF FORM ADV:  
BROCHURE SUPPLEMENT  
MARCH 2020**

**Anthony S. D'Amico**



**7530 Lucerne Drive, Suite 400  
Middleburg Heights, OH 44130  
(440) 572-5552  
[www.FidatoWealth.com](http://www.FidatoWealth.com)**

**Firm Contact:  
Tracy Kindall  
Compliance Administrator**

**This brochure supplement provides information about Mr. D'Amico that supplements our brochure. You should have received a copy of that brochure. Please contact Ms. Kindall if you did not receive Fidato Wealth LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. D'Amico is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD # 5753413.**

## Item 2: Educational Background & Business Experience

**Anthony S. D'Amico**

**Year of Birth:** 1975

### **Formal Education:**

- Graduated Cum Laude January 15, 1998 from John Carroll University; Bachelor of Science in Organizational Psychology; University Heights, Ohio USA
- 2015: Boston University Financial Planning Program

### **Business Background:**

- 12/2008 to Present Fidato Wealth LLC; Middleburg Heights, Ohio USA; Founder, CCO, & Managing Partner
- 01/2010 to 08/2011 Brookstone Capital Management, LLC; Investment Advisor
- 09/2008 to 01/2013 Integrity Properties LLC; Brook Park, Ohio USA; Founder & President
- 01/2006 to 01/2013 A. Valente Properties LLC; Brook Park, Ohio USA; Founder & President

### **Exams, Licenses & Other Professional Designations:**

- 2016: CERTIFIED FINANCIAL PLANNER, CFP®
- 2010: Series 65 Exam
- 1999: Ohio Life, Long Term Care, & Health Insurance License

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 71,000 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 includes 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® certification.

### **Item 3: Disciplinary Information<sup>1</sup>**

There are no legal or disciplinary events material to the evaluation of Mr. D’Amico.

### **Item 4: Other Business Activities**

Fidato Wealth LLC is also a licensed insurance agency in the State of Ohio, through which Mr. D’Amico is a licensed insurance agent, and in such capacity, may recommend, on a commission basis, the purchase of certain insurance products. A conflict of interest exists to the extent that our firm recommends the purchase of insurance products where Mr. D’Amico receives insurance commissions or other additional compensation. He spends 5% of his time on these activities. Our firm’s clients are never under any obligation to purchase insurance products from Fidato Wealth LLC in its separate capacity as an insurance agency, or from Mr. D’Amico in his capacity as a licensed insurance agent. Fidato Wealth LLC pledges to use fixed life Insurance Products only when deemed to be in the clients’ best interest.

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

Mr. D’Amico does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### **Item 6: Supervision**

Tracy Kindall supervises and monitors Mr. D’Amico’s activities on a regular basis. Please contact Ms. Kindall if you have any questions about Mr. D’Amico’s brochure supplement at 440-572-5552.

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<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Mr. D’Amico to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Mr. D’Amico to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

**ITEM 1: COVER PAGE  
PART 2B OF FORM ADV: BROCHURE SUPPLEMENT  
MARCH 2020**

**Amy J. D'Amico**



**7530 Lucerne Drive, Suite 400  
Middleburg Heights, OH 44130  
(440) 572-5552  
[www.FidatoWealth.com](http://www.FidatoWealth.com)**

**Firm Contact:  
Tracy Kindall  
Compliance Administrator**

**This brochure supplement provides information about Ms. D'Amico that supplements our brochure. You should have received a copy of that brochure. Please contact Ms. Kindall if you did not receive Fidato Wealth LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. D'Amico is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD # 6126277.**

## Item 2: Educational Background & Business Experience

**Amy J. D'Amico**

**Year of Birth:** 1969

### **Education Background:**

- 1991: University of Dayton; Bachelor of Arts in Psychology
- 2001: Ursuline College; Master's Degree in Art Therapy

### **Business Background:**

- 06/2009 – Present      Fidato Wealth LLC; President & Managing Partner
- 10/2007 – 06/2009      Pleasant Lake Villa; Social Worker
- 08/1999 – 10/2007      Applewood Centers; Art Therapist

### **Exams, Licenses & Other Professional Designations:**

- 2012: Series 65 Exam

## Item 3: Disciplinary Information<sup>1</sup>

There are no legal or disciplinary events material to the evaluation of Ms. D'Amico.

## Item 4: Other Business Activities

Ms. D'Amico does not have any outside business activities to report.

## Item 5: Additional Compensation

Ms. D'Amico does not receive any other economic benefit for providing advisory services in addition to advisory fees.

## Item 6: Supervision

Tracy Kindall supervises and monitors Ms. D'Amico's activities on a regular basis. Please contact Ms. Kindall if you have any questions about Ms. D'Amico's brochure supplement at 440-572-5552.

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<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Ms. D'Amico to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Ms. D'Amico to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

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MARCH 2020**

**Brian Eberhardt**



**7530 Lucerne Drive, Suite 400  
Middleburg Heights, OH 44130  
(440) 572-5552  
[www.FidatoWealth.com](http://www.FidatoWealth.com)**

**Firm Contact:  
Anthony S. D'Amico  
Chief Compliance Officer**

**This brochure supplement provides information about Mr. Eberhardt that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. D'Amico, Managing Member and Chief Compliance Officer, if you did not receive Fidato Wealth LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Eberhardt is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD # 6610764.**

## Item 2: Educational Background & Business Experience

**Brian Eberhardt**

**Year of Birth:** 1982

### **Education Background:**

- 2011: Cleveland State University; Bachelor of Business Administration in Finance
- 2018: Northwestern University; Financial Planning Program

### **Business Background:**

- 10/2015 – Present      Fidato Wealth LLC; Lead Wealth Advisor
- 07/2013 – 09/2015      PNC Capital Advisors, LLC; Senior Advisor Operations Analyst
- 08/2012 – 07/2013      PNC Wealth Management; Operations Analyst
- 04/2011 – 08/2012      Apprisen Financial; Financial Counselor
- 07/2005 – 04/2011      The Ciulla Group; Staff Accountant

### **Exams, Licenses & Other Professional Designations:**

- 2016: Series 65 Exam

## Item 3: Disciplinary Information<sup>1</sup>

There are no legal or disciplinary events material to the evaluation of Mr. Eberhardt.

## Item 4: Other Business Activities

Mr. Eberhardt does not have any outside business activities to report.

## Item 5: Additional Compensation

Mr. Eberhardt does not receive any other economic benefit for providing advisory services in addition to advisory fees.

## Item 6: Supervision

Mr. D'Amico supervises and monitors Mr. Eberhardt's activities on a regular basis. Please contact Mr. D'Amico if you have any questions about Mr. Eberhardt's brochure supplement at 440-572-5552

<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Mr. Eberhardt to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Mr. Eberhardt to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

**ITEM 1: COVER PAGE  
PART 2B OF FORM ADV: BROCHURE SUPPLEMENT  
SEPTEMBER 2020**

**Marissa Beyer**



**7530 Lucerne Drive, Suite 400  
Middleburg Heights, OH 44130  
(440) 572-5552  
[www.FidatoWealth.com](http://www.FidatoWealth.com)**

**Firm Contact:  
Anthony S. D'Amico  
Chief Compliance Officer**

**This brochure supplement provides information about Ms. Beyer that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. D'Amico, Managing Member and Chief Compliance Officer, if you did not receive Fidato Wealth LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Beyer is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD # 5003332.**

## Item 2: Educational Background & Business Experience

**Marissa Grace Beyer**

**Year of Birth:** 1982

### **Education Background:**

- 2005: Edinboro University; Bachelor of Science in Business

### **Business Background:**

- 08/2020 – Present      Fidato Wealth LLC; Lead Wealth Advisor
- 07/2015 – 08/2020    True Wealth Design; Senior Wealth Advisor
- 10/2005 – 06/2015    RAV Financial Services; Associate Advisor/Advisor

### **Exams, Licenses & Other Professional Designations:**

- 2010: CERTIFIED FINANCIAL PLANNER, CFP®

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- 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® certification.

### **Item 3: Disciplinary Information<sup>1</sup>**

There are no legal or disciplinary events material to the evaluation of Ms. Beyer.

### **Item 4: Other Business Activities**

Ms. Beyer is a licensed insurance agent registered in the state of Ohio. She may offer products and receive normal and customary commissions because of these transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation they may earn. Our firm's clients are never under any obligation to purchase insurance products from Fidato Wealth LLC in its separate capacity as an insurance agency or from a licensed insurance agent at our firm. She will not, however, be offering insurance products nor will she receive customary fees because of insurance sales.

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

Ms. Beyer does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### **Item 6: Supervision**

Mr. D'Amico supervises and monitors Ms. Beyer's activities on a regular basis. Please contact Mr. D'Amico if you have any questions about Mr. Beyer's brochure supplement at 440-572-5552

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<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Ms. Beyer to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Ms. Beyer to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

**ITEM 1: COVER PAGE**  
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**MARCH 2020**

**Melissa Leeann Latimer**



**7530 Lucerne Drive, Suite 400**  
**Middleburg Heights, OH 44130**  
**(440)572-5552**  
**[www.FidatoWealth.com](http://www.FidatoWealth.com)**

**Firm Contact:**  
**Anthony S. D'Amico**  
**Chief Compliance Officer**

This brochure supplement provides information about Ms. Latimer that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. D'Amico, Managing Member and Chief Compliance Officer, if you did not receive Fidato Wealth LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Latimer is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD # 5538533.

## Item 2: Educational Background & Business Experience

**Melissa Leeann Latimer**

**Year of Birth:** 1969

### **Education Background:**

- 1991: Baldwin Wallace College; Bachelor of Arts in Education

### **Business Background:**

- 09/2019 – Present      Fidato Wealth LLC; Client Service Specialist
- 04/2008– 06/2019      Key Investment Services; Senior Technical Specialist

### **Exams, Licenses & Other Professional Designations:**

- 2012: Series 66 Exam
- 2008: Series 7 Exam
- 1999: Ohio Accident, Health, Life and Variable Insurance License

## Item 3: Disciplinary Information<sup>1</sup>

There are no legal or disciplinary events material to the evaluation of Ms. Latimer.

## Item 4: Other Business Activities

Ms. Latimer is a licensed insurance agent registered in the state of Ohio. She may offer products and receive normal and customary commissions as a result of these transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation they may earn. Our firm's clients are never under any obligation to purchase insurance products from Fidato Wealth, LLC in its separate capacity as an insurance agency or from a licensed insurance agent at our firm. Fidato Wealth, LLC pledges to use fixed life Insurance Products only when deemed to be in the clients' best interest. She will not, however, be offering insurance products nor will she receive customary fees as a result of insurance sales.

## Item 5: Additional Compensation

Ms. Latimer does not receive any other economic benefit for providing advisory services in addition to advisory fees.

## Item 6: Supervision

Mr. D'Amico supervises and monitors Ms. Latimer's activities on a regular basis. Please contact Mr. D'Amico if you have any questions about Ms. Latimer's brochure supplement at 440-572-5552.

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<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Mr. Stribula to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Mr. Stribula to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

**ITEM 1: COVER PAGE**  
**PART 2B OF FORM ADV: BROCHURE SUPPLEMENT**  
**MARCH 2020**

**Mitchel Jay Erdman**



**14 7<sup>th</sup> Ave. North St. Cloud, MN 56303**  
**(320) 333-1638**  
**[www.FidatoWealth.com](http://www.FidatoWealth.com)**

**Firm Contact:**  
**Anthony S. D'Amico**  
**Chief Compliance Officer**

This brochure supplement provides information about Mr. Erdman that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. D'Amico, Managing Member and Chief Compliance Officer, if you did not receive Fidato Wealth LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Erdman is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD # 1374434.

## Item 2: Educational Background & Business Experience

**Mitchel Jay Erdman**

**Year of Birth:** 1958

### **Education Background:**

- 1983: Anoka Ramey Community College
- 1998: St. Cloud State University; Bachelor of Science in Finance

### **Business Background:**

- 07/2015 – Present      Fidato Wealth LLC; Investment Advisor
- 07/2011 – Present      MJ-IRA; Sole Proprietor of Insurance Sales
- 04/1997 – 05/2011      Wolters Kluwer; IRA Consultant

### **Exams, Licenses & Other Professional Designations:**

- 2011: Life Insurance
- 2015: Series 65 Exam

## Item 3: Disciplinary Information<sup>1</sup>

There are no legal or disciplinary events material to the evaluation of Mr. Erdman.

## Item 4: Other Business Activities

Mr. Erdman is a licensed insurance agent registered with an insurance firm independent of Fidato Wealth LLC. He may offer products and receive normal and customary commissions as a result of these transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation they may earn.

## Item 5: Additional Compensation

Mr. Erdman does not receive any other economic benefit for providing advisory services in addition to advisory fees.

## Item 6: Supervision

Mr. D'Amico supervises and monitors Mr. Erdman's activities on a regular basis. Please contact Mr. D'Amico if you have any questions about Mr. Erdman's brochure supplement at 440-572-5552.

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<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Mr. Erdman to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Mr. Erdman to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.