

Westbourne Investment Advisors, Inc.

Part 2B of Form ADV – Brochure Supplement

February 14, 2025

Prepared By:

**Westbourne Investment Advisors, Inc.
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<i>Scot E. Labin</i> CRD# 2726188	<i>Joseph C. Wilkinson</i> CRD# 5730945
<i>Bruce S. Kromminga</i> CRD# 2575804	
<i>Jonathan S Levin</i> CRD # 4602675	

This brochure supplement provides information about above individuals that supplements Westbourne Investment Advisors Inc.'s Firm Brochure (Form ADV Part 2A). You should have received a copy of that brochure. Please contact Bruce S. Kromminga, CCO of Westbourne Investment Advisors at the number listed above or via email at bruce@westbourneinvadvisors.com if you did not receive Westbourne Investment Advisors Inc.'s Firm Brochure or if you have any questions about the contents of this supplement.

Additional information about Scot E. Labin, Joseph C. Wilkinson Bruce S. Kromminga and Jonathan S. Levin is also available on the SEC's website at www.advisorinfo.sec.gov.

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Westbourne Investment Advisors, Inc. Investment Advisory Personnel

Scot E. Labin (Director of Research)

Educational Background:

- M.B.A. – College of William and Mary
- B.S. Mechanical Engineering - Virginia Tech University
- CFA (Chartered Financial Analyst)

Business Experience:

Scot E. Labin serves as CFO and Co-Chief Investment Officer for Bay Bridge Capital Management, LLC since 2007. Before joining Bay Bridge and Westbourne, Mr. Labin was an Analyst for Legg Mason Capital Management from 1997-2007.

Professional Designations

Chartered Financial Analyst (CFA): The CFA Program is a graduate-level self-study program that combines a broad-based curriculum of investment principles with professional conduct requirements. It is designed to prepare charterholders for a wide range of investment specialties that apply in every market all over the world. To earn a CFA charter, applicants study for three exams (Levels I, II, III) using an assigned curriculum. Upon passing all three exams and meeting the professional and ethical requirements, they are awarded a charter.

Disciplinary History, Other Business Activities, and Additional Compensation:

Scot E. Labin is CEO of Bay Bridge Capital Management, LLC, a Maryland Registered Investment Adviser.

Procedures for Managing Client Accounts:

Scot E. Labin provides analytical and trading responsibility for management of client accounts.

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Westbourne Investment Advisors, Inc. Operations Personnel

Joseph C. Wilkinson (Vice President)

Educational Background:

- B.S. (Accounting) – University of Maryland – College Park, Maryland
- M.B.A. – Loyola University Maryland – Baltimore, Maryland
- Qualified FINRA Series 65

Business Experience:

Prior to joining Westbourne, Joe spent over 25 years in corporate finance roles, including as the head of investor relations at several prominent public companies including CSX Corporation, Nextel Communications, XM Satellite Radio, Iridium, Deltek and Millennial Media. In these roles, Joe acted as the main liaison between Wall Street investors, analysts, and company management. He began his career in public accounting, earning a CPA and spending two years at the accounting firm Arthur Andersen as an auditor. From there, he became a manager in audit advisory services at CSX Corporation, a multi-national transportation conglomerate, and was eventually recruited into corporate finance and various public company investor relations roles noted above.

Disciplinary History, Other Business Activities, and Additional Compensation:

None

Procedures for Managing Client Accounts:

Joe Wilkinson provides analytical and trading support to Scot Labin's management of client accounts.

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Westbourne Investment Advisors, Inc. Operations Personnel

Bruce S. Kromminga (Vice President & Chief Compliance Officer)

Educational Background:

- B.S. (Business Administration) – University of Denver – Denver, Colorado
- M.S. (Finance) – Loyola University Maryland - Baltimore, Maryland
- Qualified FINRA Series 65

Business Experience:

Before joining Westbourne Bruce served as Chief Operating Officer of Bay Bridge Capital Management. Bruce was employed as a securities broker with Deutsche Banc Alex Brown Employee Brokerage Services from 1998-2002. Bruce served both local and international DBAB employees with transactions in equities, bonds, options, mutual funds, and foreign currencies. Prior to becoming a Series 7 licensed securities broker in 1998, Bruce worked as a registered sales assistant in Alex Brown's High Net Worth brokerage group beginning in 1995. From 2002 until his joining Bay Bridge Capital Management, Bruce analyzed publicly traded companies for purpose of investment.

Disciplinary History, Other Business Activities, and Additional Compensation:

None

Procedures for Managing Client Accounts:

Bruce S. Kromminga provides administrative and operational support to Scot Labin's management of client accounts.

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Westbourne Investment Advisors, Inc. Operations Personnel

Jonathan S. Levin (Investment Advisor Representative)

Educational Background:

- Bachelor of Science, Accounting, Pennsylvania State University
- Certified Public Accountant (CPA)

Business Experience:

- 10/2021 – Present, Westbourne Investment Management, Investment Advisor Representative
- 09/1992 – Present, Levin & CO, CPA's, Owner
- 10/1997 – 10/2021, Levin Investment Advisors, LLC

Professional Designations

CPA (Certified Public Accountant): CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two-year period or 120 hours over a three-year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's Code of Professional Conduct within their state accountancy laws or have created their own.

Other Business Activities

Mr. Levin is a Certified Public Accountant. Accounting services provided by Levin and Company and are separate and distinct from our advisory services and are provided for separately and require typical compensation. There are no referral fee arrangements between our firms for these recommendations. No client is obligated to use them for any accounting services and conversely, no accounting client is obligated to use the advisory services provided by us. Their accounting services do not include the authority to sign checks or otherwise disburse funds on any of our advisory client's behalf.

Disciplinary History and Additional Compensation:

None

Procedures for Managing Client Accounts:

Bruce S. Kromminga provides administrative and operational support to Jonathan S. Levin's management of client accounts.