

## KEN D. BOLTON

CS PLANNING CORP DBA MILESTONE PRIVATE WEALTH MANAGEMENT

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This Brochure Supplement provides information about Ken D. Bolton, an Independent Contractor and Advisor Affiliate with CS Planning Corp. (“CSP”) and doing business as Milestone Private Wealth Management. You should have received a copy of CSP’s Brochure. Please contact us at (805) 407-4863 if you did not receive a Brochure, or if you have any questions about the contents of this Brochure Supplement.

CSP requires any Advisory Affiliates involved in the practice of providing investment advice to Clients to have at a minimum, a bachelor degree from an accredited university, preferably with a major in finance, economics, or business, etc. These Advisory Affiliates must also pass appropriate licensing examinations and are strongly encouraged to seek continuing education opportunities available in the industry, including appropriate certifications or designations.

Additional information about CSP and/or Ken D. Bolton is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 Educational Background and Business Experience**

### **Ken D. Bolton**

Year of Birth: 1956

Independent Contractor/Advisor Affiliate, CS Planning Corp.

### **Education**

Bachelor of Science, California Lutheran University, 1980

### **Business Background**

01/2018 – Present	CS Planning Corp. <i>Investment Advisor Representative (Independent Contractor)</i>
01/2018 – Present	Milestone Private Wealth Management, LLC <i>Managing Member</i>
07/2005 – 01/2018	Meridian Private Wealth Management, Inc. <i>Managing Partner</i>
05/2009 – 01/2018	Wells Fargo Advisors Financial Network LLC <i>Registered Representative / Investment Advisor Representative</i>
07/2005 – 05/2009	Wachovia Securities Financial Network, LLC <i>Senior Financial Advisor</i>
01/1989 – 07/2005	Dean Witter Reynolds Inc. <i>Registered Representative</i>
04/1985 – 01/1989	County of Santa Barbara <i>Elections Clerk</i>

### **Item 3 Disciplinary Information**

Mr. Bolton is not the subject of any legal or disciplinary proceedings which would be considered material (or otherwise) to a client's evaluation of him or any of the services CSP provides.

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

Mr. Bolton is not involved in any other investment related business activity other than through CSP.

### **Item 5 Additional Compensation**

Mr. Bolton does not receive additional compensation or economic benefit from third parties for providing advisory services to clients of CSP.

### **Item 6 Supervision**

Christopher K. Hicks, Chief Compliance Officer, is involved in supervising the overall activities of Mr. Bolton. Oversight is conducted through a review of activities that are captured on the CSP management systems which incorporate documentation of client interactions, communication workflows and trading activities. Mr. Hicks may be reached at (503) 445-1957.