

# **Brochure Supplement**

(Part 2B of Form ADV)

## Carla J. Merlak

Merlak Tax Advisory Group Inc.

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This Brochure Supplement provides information about Carla J. Merlak (CRD# 2952938) that supplements the Brookstone Capital Management, LLC Brochure. You should have received a copy of that Brochure. Please contact (630) 923-6850 if you did not receive Brookstone Capital Management's Brochure or if you have any questions about the contents of this supplement. Brookstone Capital Management is located at 1745 S. Naperville Road, Suite 200, Wheaton, IL 60189.

Additional information about Carla J. Merlak is available on the SEC's website at www.adviserinfo.sec.gov.

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# **Investment Advisor Representative (IAR) Name**Carla J. Merlak

#### Year of Birth

1957

#### **Education**

Harper College Various Accounting Courses Attended 1977-1978

#### **Work Experience**

Brookstone Capital Management Investment Advisor Representative June 13, 2016 to Present

Merlak Tax Advisory Group Inc. President April 2009 to Present

#### **Disciplinary Information**

Brookstone Capital Management is required to disclose the pertinent facts regarding certain legal or disciplinary events for the client's evaluation of an IAR. There are no required disclosures in relation to this item. Further information regarding Carla J. Merlak is available at <a href="https://www.adviserinfo.sec.gov">www.adviserinfo.sec.gov</a>.

#### **Other Business Activities**

IAR is also a licensed insurance agent. In this capacity, IAR may offer fixed and life and annuity insurance products and receive normal and customary commissions as a result of any purchases made by clients. The client is under no obligation to purchase fixed life or annuity insurance products through IAR on a commissionable basis.

Merlak Tax Advisory Group Inc. – President – Work on tax preparation, tax planning, bill payments and office management and payroll.

Next Phase Financial LLC- advises in financial and retirement planning

### **Additional Compensation**

In addition, IAR may receive other compensation such as trails. The potential for receipt of commissions and other compensation when IAR acts as an insurance agent gives IAR an incentive to recommend insurance products based on the compensation received. IAR is

eligible for any incentive programs as described in the Brookstone Capital Management disclosure brochure.

#### **Supervision**

The individual responsible for monitoring IAR's advisory activities is Matt Lovett, Chief Compliance Officer for Brookstone Capital Management. Brookstone Capital Management reviews the personal trading activities and the investments made in the client accounts of IAR.

In addition, Brookstone Capital Management supervises the investments recommended by IAR to ensure those investments are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. Brookstone Capital Management periodically reviews advisory activities of IAR, which may include reviewing individual accounts and correspondences (including e-mails) sent to and received by Carla J. Merlak.

Matt Lovett can be reached at (630) 653-1400 ext. 7023 or <a href="matt@brookstonecm.com">matt@brookstonecm.com</a>.