

# Barker Wealth Management, LLC

## Form ADV Part 2B Brochure Supplement

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### Cover Page (Item 1)

**Investment Advisor Representative: Gregory Scott Barker, CFP®**

Barker Wealth Management, LLC  
2005 SE 192nd Avenue, Suite 200  
Camas, WA 98607

Telephone (503) 616-8680  
[BarkerWealthManagement.com](http://BarkerWealthManagement.com)

Date of Brochure: March 6, 2024

This Brochure Supplement provides information about Gregory Scott Barker (“Scott Barker”) that supplements the Barker Wealth Management, LLC (“Barker Wealth Management”) firm brochure. You should have received a copy of that brochure. Please contact Scott Barker if you did not receive the Barker Wealth Management firm brochure or if you have any questions about the contents of this brochure supplement. Additional information about Barker Wealth Management and Scott Barker is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Scott Barker’s CRD number is 2784196.

### Educational Background and Business Experience (Item 2)

Scott Barker was born in 1970. He attended University of Alaska Fairbanks where he earned a Bachelor of Arts degree in International Business Management in 1996.

Scott Barker is a CFP® (Certified Financial Planner). The CFP® designation is issued by the Certified Financial Planner Board of Standards, Inc. A CFP® candidate must have a bachelor’s degree or higher from an accredited college or university, and 3 years full-time personal financial planning experience or 2 years under the supervision of a CFP professional. The candidate must complete a CFP-board registered program or hold one of the following: CPA, ChFC, CLU, CFA, Ph.D. in business or economics, Doctor of Business Administration or an Attorney’s License. CFP® candidates must pass the CFP® Certification Examination and agree to be bound by the CFP Board’s Code of Ethics and Standards of Conduct. To maintain the designation, CFP® designees must attend at least 30 hours of continuing education every two years.

### Business Experience:

- Barker Wealth Management, LLC, 2015 to present, Owner and Investment Advisor Representative
- Clark Nuber P.S., 2016 to present, Investment Advisor Representative
- Etesian Wealth Management, Inc., 2014 to 2015, Investment Advisor Representative
- Moss Adams Wealth Advisors, LLC, 2012 to 2014, Senior Financial Advisor, Investment Advisor Representative
- PK Financial, 2010 to 2012, Investment Advisor Representative
- Jones and Roth Wealth Management, 2001 to 2009, Director of Financial Services, Investment Advisor Representative
- Ameriprise Financial, 1996 to 2001, Financial Advisor and franchise owner

### **Disciplinary Information (Item 3)**

There are no legal or disciplinary events material to the evaluation of Scott Barker.

### **Other Business Activities (Item 4)**

As noted in Item 10 of Barker Wealth Management's Form ADV Part 2A, Scott Barker is also registered as an Investment Advisor Representative of Clark Nuber P.S., a separately owned and independent investment advisor located in Bellevue, Washington. In addition to being registered as an Investment Advisor, Clark Nuber P.S. is an accounting firm that provides a wide array of accounting, tax and consulting services. Scott Barker receives compensation from Clark Nuber P.S. for providing financial planning services to their clients. Because of this compensation he has a financial incentive to recommend that clients and prospective clients use Clark Nuber P.S. for financial services. This incentive creates a conflict of interest between you the client, and Scott Barker, where his advice or recommendation might be based upon his compensation rather than a client's best interest.

### **Additional Compensation (Item 5)**

Except as described in Item 4 above, Scott Barker does not receive any other economic benefit or additional compensation of any kind for providing advisory services to Barker Wealth Management's clients.

### **Supervision (Item 6)**

Scott Barker is the Chief Compliance Officer of Barker Wealth Management and supervises the firm in the areas of client services and advice, investment policies, forms and procedures, day to day operations, general management of the firm and compliance related matters.

# Barker Wealth Management, LLC

## Form ADV Part 2B Brochure Supplement

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### Cover Page (Item 1)

**Investment Advisor Representative: Charles A. Petitjean, CFP®**

Barker Wealth Management, LLC  
2005 SE 192nd Avenue, Suite 200  
Camas, WA 98607

Telephone (503) 616-8680  
[BarkerWealthManagement.com](http://BarkerWealthManagement.com)

Date of Brochure: March 6, 2024

This Brochure Supplement provides information about **Charles A. Petitjean, CFP®** (“Charles Petitjean”) that supplements the Barker Wealth Management, LLC (“Barker Wealth Management”) firm brochure. You should have received a copy of that brochure. Please contact Scott Barker if you did not receive the Barker Wealth Management firm brochure or if you have any questions about the contents of this brochure supplement. Additional information about Barker Wealth Management and Charles Petitjean is available on the SEC’s [website at www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Charles Petitjean’s CRD number is 6829472.

### Educational Background and Business Experience (Item 2)

Charles Petitjean was born in 1996. He attended Oregon State University where he earned a Bachelor’s degree in Finance and Business Information Systems in 2018.

Charles Petitjean is a CFP® (Certified Financial Planner). The CFP® designation is issued by the Certified Financial Planner Board of Standards, Inc. A CFP® candidate must have a bachelor’s degree or higher from an accredited college or university, and 3 years full-time personal financial planning experience or 2 years under the supervision of a CFP professional. The candidate must complete a CFP-board registered program or hold one of the following: CPA, ChFC, CLU, CFA, Ph.D. in business or economics, Doctor of Business Administration or an Attorney’s License. CFP® candidates must pass the CFP® Certification Examination and agree to be bound by the CFP Board’s Code of Ethics and Standards of Conduct. To maintain the designation, CFP® designees must attend at least 30 hours of continuing education every two years.

Business Experience:

- Barker Wealth Management, LLC, 7/2023 to present, Investment Advisor Representative
- Cable Hill Partners, LLC, 5/2022 to 6/2023, Investment Advisor Representative/Relationship Manager
- Barker Wealth Management, LLC, 3/2020 to 5/2022, Financial Advising Associate
- Mercer, LLC, 2/2019 to 3/2020, Senior Consulting Analyst
- Oregon State University, 9/2014 to 12/2018, Student

### **Disciplinary Information (Item 3)**

There are no legal or disciplinary events material to the evaluation of Charles Petitjean.

### **Other Business Activities (Item 4)**

Charles Petitjean has no business activities outside of Barker Wealth Management.

### **Additional Compensation (Item 5)**

Charles Petitjean does not receive any other economic benefit or additional compensation of any kind for providing advisory services to Barker Wealth Management's clients.

### **Supervision (Item 6)**

Scott Barker is the Chief Compliance Officer of Barker Wealth Management and supervises the activities of Charles Petitjean. In his role as Chief Compliance Officer, Mr. Barker supervises Barker Wealth Management in the areas of client services and advice, investment policies, forms and procedures, day to day operations, general management of the firm and compliance related matters. Mr. Barker can be reached at (503) 616-8680 or [Scott.Barker@BarkerWealthManagement.com](mailto:Scott.Barker@BarkerWealthManagement.com).