

Lee-Kelleher Wealth Management

James Lee
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Lee-Kelleher Wealth Management
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**Form ADV Part 2B
Firm Brochure
Supplement
September 30, 2024**

This Brochure Supplement provides information for James Lee that supplements the Lee-Kelleher Wealth Management brochure. You should have received a copy of that brochure. Please contact us at 301-450-2617 or will@lkwealthmanagement.com if you did not receive LKWM's Brochure or if you have any questions about the contents of this supplement.

Additional information about James Lee is also available on the SEC's website at www.adviserinfo.sec.gov.

ITEM 2**Educational Background and Business Experience**

James Lee, born in 1962, graduated from Syracuse University in December 1987 with a Bachelor of Science in Business. James Lee's employment information is listed below.

June 2024-Present, Lee-Kelleher Wealth Management, Partner

March 2012-July, 2024, Bank of America, Financial Advisor

August 2011 to July 2024, Merrill Lynch Columbia, MD, Financial Advisor

ITEM 3**Disciplinary Information**

James Lee has not been and/or is presently not involved in any disciplinary, legal, or regulatory events that would be material to a client's evaluation of him or of LKWM.

ITEM 4**Other Business Activities**

James Lee does not engage in any other business activities.

ITEM 5**Additional Compensation**

James Lee does not receive any additional compensation.

ITEM 6**Supervision**

Will Kelleher, Partner and Chief Compliance Officer of LKWM, is responsible for supervising the investment advisory activities of the investment adviser representatives. Will Kelleher monitors and reviews all forms of written communications that the investment adviser representatives provide to clients. Will Kelleher can be contacted via telephone at 301-450-2617 and via email at will@lkwealthmanagement.com.

ITEM 7**Requirements for State-Registered Advisers**

A. James Lee has not been involved in an award or found liable in any arbitration claim or in any civil, self-regulatory organization, or administrative proceedings.

B. James Lee has not been the subject of a bankruptcy petition.