

**Item 1 Cover Page**

A.

**Leslie C. Quick III**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer

360 Mount Kemble Ave.

Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Leslie Quick that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Leslie Quick was born in 1953. Mr. Quick graduated from St. Bonaventure University in 1975, with a Bachelor of Business Administration degree in Finance.

Mr. Quick co-founded the firm in 2004 and currently sits on the firm's Investment Committee.

Mr. Quick began his career in 1975 as the fourth employee of Quick and Reilly Inc., the first New York Stock Exchange (NYSE) member to offer discount stock brokerage to the investing public. Over his 28 years with the firm, he served in many capacities. He was a key member of the management team that built the branch network, started, and grew a major clearing firm, acquired, and ran a major NASDAQ market making firm, made many acquisitions of NYSE SPECIALIST firms and built one of the first electronic internet trading platforms in the industry. Mr. Quick was the company liaison when it offered stock to the public in 1983 and became a listed company on the NYSE. Mr. Quick completed his tenure as Chairman of Fleet Securities, Inc. after Quick and Reilly Group, Inc. was acquired by Fleet Bank in 1998.

### **Item 3 Disciplinary Information**

Mr. Quick has no reportable events that would be material to a client's evaluation of Mr. Quick or Simon Quick Advisors, LLC.

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

- A. Mr. Quick is a Founding Partner and equity owner of Simon Quick Advisors, LLC.
- B. Mr. Quick also serves on the finance and investment committees of St. Bonaventure University, Bishop's Finance Council for the Diocese of Metuchen, St. Mary's Abbey Delbarton, Franciscan Friars of the Holy Name Province and the Finance Council for Our Lady of Perpetual Help.
- C. Mr. Quick is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Founding Partner and equity owner of Simon Quick Advisors, LLC, Mr. Quick earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Quick has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("Act"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Quick is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**Joseph A. Belfatto**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Joseph Belfatto that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Joseph Belfatto was born in 1954. Mr. Belfatto graduated from Seton Hall University in 1976, with a Bachelor of Arts degree in Economics and in 1978 from Harvard Business School with a Master of Business Administration degree in Marketing and Finance.

Mr. Belfatto joined the firm as a Partner in 2007 after a 23-year career on Wall Street. Prior to joining the firm, he was a Senior Executive Vice President at HSBC and served as a member of the Executive Committee for Corporate, Investment Banking, and Markets. Mr. Belfatto currently sits on the firm's Executive Committee.

**Item 3 Disciplinary Information**

Mr. Belfatto has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Belfatto or Simon Quick Advisors, LLC.

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

- A. Mr. Belfatto is a Managing Partner and equity owner of Simon Quick Advisors, LLC.
- B. Mr. Belfatto is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

#### **Item 5 Additional Compensation**

As a Managing Partner and equity owner of Simon Quick Advisors, LLC, Mr. Belfatto earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Belfatto has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

#### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Belfatto is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 1 Cover Page

A.

**Christopher B. Moore**

Simon Quick Advisors, LLC

## **Form ADV Part 2B - Brochure Supplement Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Christopher Moore that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

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

Christopher Moore was born in 1979. Mr. Moore graduated from the College of Holy Cross in 2002, with a Bachelor of Arts degree majoring in Mathematics and minoring in Computer Science. In 2010, he earned a Master of Business Administration degree in the Executive MBA Program at Columbia Business School where his studies were focused on Finance and Investments.

Mr. Moore joined the firm in 2004. Prior to joining, Mr. Moore began his career in the financial services industry working for Aon Risk Services as a licensed Property & Casualty insurance producer servicing middle to large market corporations in the Northeast. Mr. Moore is currently a Managing Partner and sits on the firm's Executive and Investment Committees.

Mr. Moore has held the designation of Certified Financial Planner (CFP<sup>®</sup>) since 2006. The CFP<sup>®</sup> designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP<sup>®</sup>

candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

### **Item 3 Disciplinary Information**

Mr. Moore has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Moore or Simon Quick Advisors, LLC.

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

- A. Mr. Moore is a Managing Partner and equity owner of Simon Quick Advisors, LLC.
- B. Mr. Moore is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Managing Partner and equity owner of Simon Quick Advisors, LLC, Mr. Moore earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Moore has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Moore is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**John Peter Simon**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Peter Simon that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Peter Simon was born in 1953. Mr. Simon graduated from Lafayette College in 1975 with a Bachelor of Arts degree in Psychology. He also attended New York University Stern Graduate School of Business.

In 1988 Mr. Simon co-founded William E. Simon & Sons, LLC ("WESS"), a "family office" investment advisor, along with his late father, former Treasury Secretary William E. Simon, and his brother, William E. Simon, Jr. and served as Co- Chairman of WESS. Mr. Simon was previously employed by Kidder Peabody in New York City from 1975 – 1988. At Kidder Peabody, he rose to Managing Director in the Convertible Securities Department. During his time at Kidder Peabody, he was part of the Institutional Equity Trading Department specializing in convertible securities. The department established themselves as a leading underwriter and market maker in convertible securities. It also developed one of the first research products focused on converts. In 2017 Massey, Quick & Co., LLC combined with WESS to form a single combined company. Mr. Simon is currently a Founding Partner and sits on the firm's Investment Committee.

### **Item 3 Disciplinary Information**

Mr. Simon has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Simon or Simon Quick Advisors, LLC.

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

A. Mr. Simon is a Founding Partner and indirect beneficial equity owner of Simon Quick Advisors, LLC.

B. Mr. Simon is Co-Chairman of The William E. Simon Foundation, a member of the Board of Trustees of the Richard Nixon Library and Birthplace Foundation, the Arnold and Mabel Beckman Foundation, the New Vernon Cemetery Association Board of Trustees and a provisional member of the Charles Hayden Foundation. In all Board roles he has been Chair of the Investment Committee.

C. Mr. Simon serves as Trustee of the William E. Simon & Sons Retirement Plan, LLC, Co-Chairman and Trustee of the William E. Simon Family Endowment and Trustee of the Hidden Pond Foundation.

D. Mr. Simon is an Emeritus member of the Board of Trustees at Lafayette College. At the University of Rochester, he is an Emeritus member of the Executive Advisory Committee at The William E. Simon Graduate School of Business. Mr. Simon also serves as an Investment Committee member for St. Mary's Abbey. Past philanthropic commitments include appointed member of the New Jersey State Board of Education, Chairman of the Foundation for Morristown Medical Center, the Alliance for School Choice Board of Trustees, the Gladney Center Board of Trustees, the National Council for Adoption Board of Trustees, and the Peck School Board of Trustees. He was also a past member of the Covenant House New Jersey Board of Directors.

### **Item 5 Additional Compensation**

A portion of Mr. Simon's compensation is paid by a legacy WESS, current Simon Quick Advisors, LLC client. Additionally, as a Partner and equity owner of Simon Quick Advisors, LLC, Mr. Simon earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Simon has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's

Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Simon is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 1 Cover Page

A.

**Kristin M. Bell**

Simon Quick Advisors, LLC

## **Form ADV Part 2B - Brochure Supplement Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Kristin Bell that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

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

Kristin Bell was born in 1975. Ms. Bell graduated from Wheaton College with a Bachelor of Science in Psychology.

Ms. Bell joined the firm in September 2018 and currently serves as a Director of the Southeast, Principal, and Client Advisor. Before joining Simon Quick Advisors, LLC, Ms. Bell was employed with Southeastern Trust Company as a Portfolio Manager from 2015 to 2018. Prior to joining Southeastern Trust Company, Ms. Bell served as an Investment Officer for Unum Group from 2002 through 2015.

Ms. Bell has held the Chartered Financial Analyst (CFA) designation since 2004. The CFA charter is a professional designation awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Ms. Bell has held the designation of Certified Financial Planner (CFP®) since 2019. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

### **Item 3 Disciplinary Information**

Ms. Bell has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Ms. Bell or Simon Quick Advisors, LLC.

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

- A. Ms. Bell is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Ms. Bell is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Ms. Bell earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Ms. Bell has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Ms. Bell is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**McClain H. Bishop**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about McClain Bishop that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

McClain Bishop was born in 1992. Mr. Bishop graduated from Indiana University Bloomington in 2016 with a Bachelor of Science in Arts Management.

Mr. Bishop joined the firm in 2025 and is currently a Vice President. Prior to joining the firm, Mr. Bishop worked as an Assistant Vice President at Merrill, A Bank of America company.

**Item 3 Disciplinary Information**

Mr. Bishop has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Bishop or Simon Quick Advisors, LLC.

**Item 4 Other Business Activities**

Mr. Bishop is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

## **Item 5 Additional Compensation**

Mr. Bishop earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Bishop has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

## **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Bishop is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**Maritza Chow Young**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Maritza Chow Young that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Maritza Chow Young was born in 1975. Ms. Chow Young graduated from Trinity College with a Bachelor of Arts in English.

Ms. Chow Young joined the firm in March 2023 and currently serves as a Managing Director and Client Advisor. Before joining Simon Quick Advisors, LLC, Ms. Chow Young was employed with KLS Professional Advisors Group since 2001. Ms. Chow Young become employed by Boston Private after the acquisition of KLS Professional Advisors Group in 2004. Most recently, Ms. Chow Young was employed by Silicon Valley Bank after it acquired Boston Private in 2021.

**Item 3 Disciplinary Information**

Ms. Chow Young has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Ms. Chow Young or Simon Quick Advisors, LLC.

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

Ms. Chow Young is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

#### **Item 5 Additional Compensation**

As a Client Advisor, Ms. Chow Young earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Ms. Chow Young has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

#### **Item 6 Supervision**

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## Item 1 Cover Page

A.

**William F. Conger**

Simon Quick Advisors, LLC

## **Form ADV Part 2B - Brochure Supplement Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about William Conger that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

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

William Conger was born in 1946. Mr. Conger graduated from the University of Maryland with a Bachelor of Science in 1973.

Mr. Conger joined the firm in April 2022 as a Senior Managing Director when Simon Quick Advisors, LLC combined with Red Hook Management, LLC ("RHM") to form a single combined company. Mr. Conger has over forty years' experience in the securities industry and served as Portfolio Manager and a Principal of RHM since its inception in 2008.

### **Item 3 Disciplinary Information**

Mr. Conger has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Conger or Simon Quick Advisors, LLC.

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

Mr. Conger is the Chairman of the Board of The Raptor Trust. The firm manages The Raptor Trust's endowment. Mr. Conger is not a member of the Investment Committee of The Raptor

Trust and does not have a vote on investment decisions.

### **Item 5 Additional Compensation**

As a Senior Managing Director, Mr. Conger earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Conger has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

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**Item 1 Cover Page**

A.

**Connor N. Donovan**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Connor Donovan that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Connor Donovan was born in 1995. Mr. Donovan graduated with Honors from Lehigh University in 2017 with a Bachelor of Science in Business and Economics with a major in Finance and a minor in Entrepreneurship. Mr. Donovan joined the firm in 2017 and is currently a Vice President, Principal, and Client Advisor.

Mr. Donovan has held the designation of Certified Financial Planner (CFP®) since 2019. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

### **Item 3 Disciplinary Information**

Mr. Donovan has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Donovan or Simon Quick Advisors, LLC.

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

- A. Mr. Donovan is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Mr. Donovan is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Mr. Donovan earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Donovan has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Donovan is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**Andrew F. Ferguson**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer

360 Mount Kemble Ave.

Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Andrew Ferguson that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Andrew Ferguson was born in 1961. Mr. Ferguson graduated from the University of Arizona in 1983 with a Bachelor of Science in Finance.

Mr. Ferguson joined the firm as a Principal, Senior Managing Director, and Client Advisor in 2025 after a 37-year career at Merrill Lynch. Before joining the firm, Mr. Ferguson founded Proquility Private Wealth Partners and served as the CEO from 2020 until May 2025, when Simon Quick Advisors, LLC acquired Proquility Private Wealth Partners.

Mr. Ferguson has held the designation of Certified Financial Planner (CFP<sup>®</sup>) since 1999. The CFP<sup>®</sup> designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP<sup>®</sup> candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and

oversight by the CFP Board.

Mr. Ferguson has held the designation of Certified Investment Management Analyst (CIMA<sup>®</sup>) since 2000. The CIMA<sup>®</sup> certification signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for investment management consulting. The designation is administered through The Investments & Wealth Institute (“IWI”) formerly known as the Investment Management Consultants Association. Prerequisites for the CIMA<sup>®</sup> certification are 3 years of financial services experience and an acceptable regulatory history. To obtain the CIMA<sup>®</sup> certification, candidates must pass an online Qualification Examination, successfully complete a one-week classroom education program provided by a Registered Education Provider, pass an online Certification Examination, and have an acceptable regulatory history. CIMA<sup>®</sup> designees are required to adhere to IWI’s *Code of Professional Responsibility, Standards of Practice, and Rules and Guidelines for Use of the Marks*. CIMA<sup>®</sup> designees must report 40 hours of continuing education credits, including two ethics hours, every 2 years to maintain the certification.

Mr. Ferguson has held the designation of Chartered Financial Consultant (ChFC<sup>®</sup>) since 2001. The ChFC<sup>®</sup> designation is offered by The American College. Designation holders are required to serve clients with the highest level of professionalism. The authority to use the ChFC<sup>®</sup> mark is granted by the Certification Committee of the Board of Trustees of The American College, and that privilege is contingent on adherence to strict ethical guidelines. All ChFC<sup>®</sup> advisors are required to do the same for clients that they would do for themselves in similar circumstances, the standard of ethical behavior most beneficial for their clients. Each ChFC<sup>®</sup> has taken nine or more college-level courses on all aspects of financial planning. The average study time for the program is over 400 hours, and advisors frequently spend years earning this distinction. Each ChFC<sup>®</sup> must also complete a minimum of 30 hours of continuing education every two years and must meet extensive experience requirements to ensure that you get the professional financial advice you need.

### **Item 3 Disciplinary Information**

Mr. Ferguson has not been involved in any legal or disciplinary events that would be material to a client’s evaluation of Mr. Ferguson or Simon Quick Advisors, LLC.

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

- A. Mr. Ferguson is a Principal and equity owner of Simon Quick Advisors, LLC.
- B. Mr. Ferguson serves as a Board Member of the Boys and Girls Clubs of Southern Nevada Foundation, a non-profit organization based in Las Vegas. Mr. Ferguson’s involvement primarily relates to investment oversight and policy guidance, contributing approximately 30 minutes per month, exclusively during non-trading hours. While Mr. Ferguson does not provide direct investment advice or manage any assets, Mr. Ferguson supports the Foundation by assisting in the development and maintenance of its investment policy statement and helping to oversee the performance and activities of the third-party asset manager. This role does not involve any compensation and does not

present any conflict of interest with Mr. Ferguson's responsibilities at Simon Quick Advisors, LLC.

#### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, LLC, Mr. Ferguson earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Ferguson has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

#### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("Act"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Ferguson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 1 Cover Page

A.

### **Brannon Fisher**

Simon Quick Advisors, LLC

## **Form ADV Part 2B - Brochure Supplement Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Brannon Fisher that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

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

Brannon Fisher was born in 1972. Mr. Fisher graduated from Colgate University with a Bachelor of Arts in English Literature. He also holds a Master of Arts in Education from the University of Colorado – Boulder and a Master of Business Administration from Dominican University of California.

Mr. Fisher joined the firm in April 2019 and currently serves as a Director, Principal, and Client Advisor. Before joining Simon Quick Advisors, LLC, Mr. Fisher was employed with Branzan Investment Advisors as Director of Client Relations from 2017 to 2019. Prior to joining Branzan, Mr. Fisher served in various administrative capacities at Bowdoin College most recently as Associate Vice President for Annual and Leadership Giving.

Mr. Fisher has held the designation of Certified Financial Planner (CFP®) since 2021. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general

principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

### **Item 3 Disciplinary Information**

Mr. Fisher has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Fisher or Simon Quick Advisors, LLC.

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

- A. Mr. Fisher is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Mr. Fisher is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Mr. Fisher earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Fisher has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Fisher is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**William B. Lalor**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about William Lalor that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

William Lalor was born in 1977. Mr. Lalor earned a Master of Business Administration with a concentration in Finance from Rutgers Business School and a Bachelor of Science degree from Rutgers School of Engineering where he majored in Ceramic and Materials Engineering.

Mr. Lalor joined the firm as a Client Advisor in 2011 and currently serves as a Managing Director, Principal, and Client Advisor.

Mr. Lalor has held the designation of Certified Financial Planner (CFP®) since 2007. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

Mr. Lalor has held the Chartered Financial Analyst (CFA) designation since 2014. The CFA charter is a professional designation awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

### **Item 3 Disciplinary Information**

Mr. Lalor has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Lalor or Simon Quick Advisors, LLC.

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

- A. Mr. Lalor is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Mr. Lalor is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Mr. Lalor earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Lalor has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Lalor is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**Arthur N. Langhaus**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Arthur Langhaus that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Arthur Langhaus was born in 1955. Mr. Langhaus graduated from Queens College in 1978 with a Bachelor of Science in Accounting and from Pace University's Lubin School of Business in 1981 with a Master of Business Administration degree in Taxation.

Mr. Langhaus joined the firm in April 2022 as a Senior Managing Director and Client Advisor and sits on the firm's Investment Committee. Before joining Simon Quick Advisors, LLC, Mr. Langhaus was employed as a Senior Managing Director with KLS, a firm he founded more than thirty years ago.

**Item 3 Disciplinary Information**

Mr. Langhaus has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Langhaus or Simon Quick Advisors, LLC.

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

Mr. Langhaus is a consultant to a select group of ultra-high net worth multi-generational families.

#### **Item 5 Additional Compensation**

As a Client Advisor, Mr. Langhaus earns annual compensation from Simon Quick Advisors, LLC based on revenue earned from clients serviced by Simon Quick Advisors, LLC. Accordingly, Mr. Langhaus has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services because the recommendation could be made based on compensation to be received rather than on a client or prospective client's best interests.

#### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Langhaus is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**Jack Mahoney**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Jack Mahoney that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Jack Mahoney was born in 1988. Mr. Mahoney graduated from Connecticut College in 2010 with a Bachelor of Arts degree majoring in International Relations and minoring in Economics.

Mr. Mahoney began his career with Bloomberg LP and was most recently with UBS Private Wealth Management in NYC from 2013 through 2018. Mr. Mahoney joined the firm in June 2018 and currently serves as a Managing Director, Principal, and Client Advisor.

Mr. Mahoney has held the designation of Certified Financial Planner (CFP®) since 2015. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

### **Item 3 Disciplinary Information**

Mr. Mahoney has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Mahoney or of Simon Quick Advisors, LLC.

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

- A. Mr. Mahoney is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Mr. Mahoney is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Mr. Mahoney earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Mahoney has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Mahoney is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**Lisa A. Manzolillo**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Lisa Manzolillo that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Lisa Manzolillo was born in 1978. Ms. Manzolillo graduated from the University of Rhode Island in 2000 with a Bachelor of Arts degree in Accounting and from Fordham University in 2005 with a Master of Business Administration degree in Finance.

Ms. Manzolillo began her career with UBS Financial Services as a Registered Client Service Associate from 2005 to 2008. After leaving UBS, Ms. Manzolillo worked at Morgan Stanley as a Financial Advisor & Financial Planning Associate from 2008 to 2016. Most recently Ms. Manzolillo was with Modera Wealth Management, LLC as a Financial Advisor from 2016 through 2018. Ms. Manzolillo joined the firm in July 2018 and currently serves as a Managing Director, Principal, and Client Advisor.

Ms. Manzolillo has held the designation of Certified Financial Planner (CFP®) since 2007. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which

broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

Ms. Manzolillo has held the designation of Certified Divorce Financial Analyst (CDFA™) since 2017. A Certified Divorce Financial Analyst (CDFA™) is a member of the Institute for Divorce Financial Analysts who specializes in the financial issues surrounding divorce. The role of the CDFA™ includes acting as an advisor to one party's divorce lawyer, or as a mediator for both parties. A CDFA™ uses his or her knowledge of tax law, asset distribution, and short-term and long-term financial planning to achieve an equitable divorce settlement. To become a CDFA™, a person must have two years of financial planning or legal experience. After attaining the proper work experience, candidates are required to complete a four-step modular program and exam designed by the IDFA. The program is a self-study system, covering financial and tax issues, with case studies of divorce settlements.

### **Item 3 Disciplinary Information**

Ms. Manzolillo has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Ms. Manzolillo or Simon Quick Advisors, LLC.

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

- A. Ms. Manzolillo is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Ms. Manzolillo is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Ms. Manzolillo earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Ms. Manzolillo has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules

thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Ms. Manzolillo is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**James V. McGurren**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about James McGurren that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

James McGurren was born in 1958. Mr. McGurren graduated from Fordham University in 1980, with a Bachelor of Science in Accounting.

Mr. McGurren joined the firm in October 2019 and currently serves as a Senior Managing Director, Principal, and Client Advisor and sits on the firm's Investment Committee. Mr. McGurren was previously employed with Next Capital Management, LLC beginning in September 2009 as a Vice President and last served as a Senior Managing Director. Before joining Next Capital Management, LLC, Mr. McGurren also served as the President/Chief Executive Officer at Dartmouth Advisory Services, Inc. since March 1992 and as Managing Director of KMC Advisory Group, LLC since January 1998.

Mr. McGurren has held the designation of Certified Financial Planner (CFP®) since 2007. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which

broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

Mr. McGurren has held the designation of Certified Public Accountant (“CPA”) since 1985. 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. To maintain a CPA license, states generally require the completion of 40 hours of continuing professional education 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. Most state boards of accountancy have adopted the AICPA’s Code of Professional Conduct within their state accountancy laws or have created their own.

Mr. McGurren does not perform any CPA services for Simon Quick Advisors, LLC.

### **Item 3 Disciplinary Information**

Mr. McGurren has not been involved in any legal or disciplinary events that would be material to a client’s evaluation of Mr. McGurren or Simon Quick Advisors, LLC.

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

- A. Mr. McGurren is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Mr. McGurren is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Mr. McGurren earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. McGurren has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client’s best interests.

## **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. McGurren is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**Larissa A. Mehlfelder**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Larissa Mehlfelder that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Larissa Mehlfelder was born in 1986. Ms. Mehlfelder graduated from The College of New Jersey with a Bachelor of Science in Finance and minor in Mathematics.

Ms. Mehlfelder joined the firm in 2009 and is currently a Managing Director, Principal, and Client Advisor and sits on the firm's Executive Committee.

Ms. Mehlfelder has held the designation of Certified Financial Planner (CFP®) since 2012. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

Ms. Mehlfelder has held the Chartered Alternative Investment Analyst (CAIA) designation since 2014. The CAIA Charter® is awarded by the CAIA Association and is granted upon successful completion of a rigorous two-level exam series, combined with relevant work experience. Earning the CAIA Charter is the gateway to becoming a member of the CAIA Association, a global network of alternative investment leaders, who have demonstrated a deep and thorough understanding of alternative investing.

### **Item 3 Disciplinary Information**

Ms. Mehlfelder has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Ms. Mehlfelder or Simon Quick Advisors, LLC

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

- A. Ms. Mehlfelder is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Ms. Mehlfelder is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Ms. Mehlfelder earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Ms. Mehlfelder has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Ms. Mehlfelder is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**Ryan P. Moffett**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer

360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Ryan Moffett that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Ryan Moffett was born in 1981. Mr. Moffett graduated from Southern Methodist University in 2004 with a Bachelor of Business Administration degree in Finance.

Mr. Moffett joined the firm in May 2025 and currently serves as a Managing Director, Principal, and Client Advisor. Before joining Simon Quick Advisors, LLC, Mr. Moffett was employed with The Northern Trust Company as a Senior Investment Officer from 2004 to 2025.

Mr. Moffett has held the designation of Certified Financial Planner (CFP®) since 2009. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

### **Item 3 Disciplinary Information**

Mr. Moffett has no reportable events that would be material to a client's evaluation of Mr. Moffett or Simon Quick Advisors, LLC.

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

- A. Mr. Moffett is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Mr. Moffett is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Mr. Moffett earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Moffett has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("Act"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Moffett is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**Thomas P. Morr**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Thomas Morr that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Thomas Morr was born in 1989. Mr. Morr graduated from Siena College in 2012, with a Bachelor of Arts degree majoring in History and minoring in Business.

Mr. Morr joined the firm in 2012 and is currently a Managing Partner and Head of Client Advisory. Mr. Morr also sits on the firm's Executive Committee.

Mr. Morr has held the designation of Certified Financial Planner (CFP®) since 2016. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

Mr. Morr has held the Chartered Alternative Investment Analyst (CAIA) designation since 2014. The CAIA Charter® is awarded by the CAIA Association and is granted upon successful completion of a rigorous two-level exam series, combined with relevant work experience. Earning the CAIA Charter is the gateway to becoming a member of the CAIA Association, a global network of alternative investment leaders, who have demonstrated a deep and thorough understanding of alternative investing.

### **Item 3 Disciplinary Information**

Mr. Morr has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Morr or Simon Quick Advisors, LLC.

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

- A. Mr. Morr is an equity owner and Managing Partner of Simon Quick Advisors, LLC.
- B. Mr. Morr is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Managing Partner and equity owner of Simon Quick Advisors, Mr. Morr earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Morr has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

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**Item 1 Cover Page**

A.

**Patrick J. Murphy**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer

360 Mount Kemble Ave.

Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Patrick Murphy that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Patrick Murphy was born in 1979. Mr. Murphy graduated from Rutgers University in 2001, with a Bachelor of Arts in Labor Relations. He went on to earn his Master of Business Administration from New York University Stern School of Business in 2010.

Mr. Murphy joined the firm in March 2026 and currently serves as a Managing Director and Client Advisor. Before joining Simon Quick Advisors, LLC, Mr. Murphy was a Principal and Senior Wealth Advisor at Bessemer Trust. Prior to that, he was a Managing Director and Private Client Advisor with Bank of America Private Bank.

Mr. Murphy has held the designation of Certified Financial Planner (CFP®) since 2021. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement

planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

### **Item 3 Disciplinary Information**

Mr. Murphy has no reportable events that would be material to a client's evaluation of Mr. Murphy or Simon Quick Advisors, LLC.

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

Mr. Murphy is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Client Advisor, Mr. Murphy earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Murphy has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("Act"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Murphy is available on the SEC's website at [www.adviserinfo.sec](http://www.adviserinfo.sec)**

**Item 1 Cover Page**

A.

**Nathan W. Ohlinger**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer

360 Mount Kemble Ave.

Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Nathan Ohlinger that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Nathan Ohlinger was born in 1987. Mr. Ohlinger from The University of Dayton in 2010, with a Bachelor of Science in Business Administration degree in Entrepreneurship and Leadership Management.

Mr. Ohlinger joined the firm in May 2025 and currently serves as a Managing Director, Principal, and Client Advisor. Before joining Simon Quick Advisors, LLC, Mr. Ohlinger was employed with The Northern Trust Company as a Managing Wealth Advisor from 2013 to 2025.

Mr. Ohlinger has held the designation of Certified Financial Planner (CFP®) since 2013. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and

oversight by the CFP Board.

Mr. Ohlinger has held the designation of Accredited Estate Planner (AEP®) since 2020. The AEP designation is a graduate-level credential awarded by the National Association of Estate Planners & Councils (NAEPC) to professionals who demonstrate advanced expertise and commitment to estate planning. To qualify, applicants must hold a recognized designation (e.g., CFP®) and be significantly engaged in estate planning activities for at least five years. Candidates must complete advanced coursework or pass exams in estate planning, provide three professional references, and maintain membership in an affiliated estate planning council. They must also uphold high ethical standards, commit to the team approach in estate planning, and meet continuing education requirements—30 hours every two years, with at least 15 in estate planning. Annual recertification confirms ongoing professional involvement, good standing, ethics compliance, and education.

### **Item 3 Disciplinary Information**

Mr. Ohlinger has no reportable events that would be material to a client's evaluation of Mr. Ohlinger or Simon Quick Advisors, LLC.

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

- A. Mr. Ohlinger is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Since 2024, Mr. Ohlinger has served as an owner and manager of IMAGE Studios and IMAGE FTW NAO1, LLC, a health and wellness franchise business located at 499 Hidden Valley Lane, Coppell, TX 75019. This role is not investment-related and involves approximately 10–15 hours per month, exclusively during non-trading hours. Mr. Ohlinger's involvement primarily consists of acting as a property manager overseeing the franchise location.
- C. Since 2023, Mr. Ohlinger has held a minority ownership interest in Chuck Warner & Associates, LLC, a commercial real estate investment and management company based at 104 Delaplane Court, Morrisville, NC 27560. This activity is not investment-related and involves limited time commitment—typically 2–5 hours per month during non-trading hours. Mr. Ohlinger's role consists of reviewing materials related to existing and prospective property holdings. The company is managed by a full-time Managing Partner who handles day-to-day operations.

Neither of these roles involve the provision of investment advice or management of client assets and do not present any conflicts of interest with my responsibilities at Simon Quick Advisors, LLC.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Mr. Ohlinger earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Ohlinger has a conflict of interest when recommending that Simon Quick Advisors, LLC

provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

## **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("Act"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Ohlinger is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**Anthony J. Santoro**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Anthony Santoro that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Anthony Santoro was born in 1987. Mr. Santoro graduated from SUNY Albany in 2010 with a Bachelor of Arts in Sociology and from Albany Law School with a Juris Doctorate in 2013. Mr. Santoro joined the firm in August 2022 and is currently a Managing Director, Principal, and Client Advisor. Mr. Santoro is licensed to practice law in New York State; however, he does not provide legal advice in his current capacity with Simon Quick Advisors, LLC.

**Item 3 Disciplinary Information**

Mr. Santoro has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Santoro or Simon Quick Advisors, LLC.

**Item 4 Other Business Activities**

- A. Mr. Santoro is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Mr. Santoro is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

## **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Mr. Santoro earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Santoro has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

## **Item 6 Supervision**

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## Item 1 Cover Page

A.

**Erin L. Slocum**

Simon Quick Advisors, LLC

## **Form ADV Part 2B - Brochure Supplement Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Erin Slocum that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

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

Erin Slocum was born in 1986. Ms. Slocum graduated from The George Washington University with a Bachelor of Science in Economics.

Ms. Slocum joined the firm in April 2022 as a Vice President and Client Advisor. Before joining Simon Quick Advisors, LLC, from 2008 to 2022, Ms. Slocum was employed with BNY Mellon Wealth Management where she where she provided financial planning and investment management services to high-net-worth individuals and families in the U.S. and abroad.

Ms. Slocum has held the designation of Certified Financial Planner (CFP®) since 2017. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and

oversight by the CFP Board.

### **Item 3 Disciplinary Information**

Ms. Slocum has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Ms. Slocum or Simon Quick Advisors, LLC.

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

Ms. Slocum is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Client Advisor, Ms. Slocum earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Ms. Slocum has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

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**Item 1 Cover Page**

A.

**Thomas C. Trynin**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Thomas Trynin that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Thomas Trynin was born in 1961. Mr. Trynin graduated from Yale University in 1983 with a Bachelor of Arts degree and the Wharton School of Business in 1990 with a Master of Business Administration degree.

Mr. Trynin joined the firm in April 2022 as a Partner when Simon Quick Advisors, LLC acquired Red Hook Management, LLC ("RHM"). Before joining the firm, Mr. Trynin served as a Portfolio Manager and Principal of RHM since January 2012 and served as President of RHM since January 2017.

**Item 3 Disciplinary Information**

Mr. Trynin has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Trynin or Simon Quick Advisors, LLC.

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

- A. Mr. Trynin is a Partner and equity owner of Simon Quick Advisors, LLC.
- B. Mr. Trynin is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

#### **Item 5 Additional Compensation**

As a Partner and equity owner of Simon Quick Advisors, LLC, Mr. Trynin earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Trynin has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

#### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Trynin is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**Shei Unger**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer

360 Mount Kemble Ave.

Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Shei Unger that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Shei Unger was born in 1974. Mr. Unger graduated from Florida State University in 1998 with a Bachelor of Science degree in Finance.

Mr. Unger joined the firm in May 2025 and currently serves as a Managing Director, Principal, and Client Advisor. Before joining Simon Quick Advisors, LLC, Mr. Unger was employed with The Northern Trust Company as a Senior Wealth Strategist from 2020 to 2025.

Mr. Unger has held the designation of Certified Financial Planner (CFP®) since 2006. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

### **Item 3 Disciplinary Information**

Mr. Unger has no reportable events that would be material to a client's evaluation of Mr. Unger or Simon Quick Advisors, LLC.

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

- A. Mr. Unger is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Mr. Unger is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Mr. Unger earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Unger has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("Act"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Unger is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

## Item 1 Cover Page

A.

**Anders P. Velischek**

Simon Quick Advisors, LLC

## **Form ADV Part 2B - Brochure Supplement Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Anders Velischek that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

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

Anders Velischek was born in 1994. Mr. Velischek graduated from Bucknell University in 2016 with a Bachelor of Science in Business Administration degree in Accounting and Financial Management. Mr. Velischek joined the firm in 2016 and is currently a Director, Principal, and Client Advisor.

Mr. Velischek has held the designation of Certified Financial Planner (CFP®) since 2019. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

### **Item 3 Disciplinary Information**

Mr. Velischek has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Velischek or Simon Quick Advisors, LLC.

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

- A. Mr. Velischek is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Mr. Velischek is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Mr. Velischek earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Velischek has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Velischek is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**Daniel B. Weitz**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Daniel Weitz that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Daniel Weitz was born in 1985. Mr. Weitz graduated from the University of Maryland in 2007 with a Bachelor of Science degree in Psychology and from Rutgers Business School in 2011 with a Master of Business Administration degree in Finance.

Mr. Weitz joined the firm in 2011 and is currently a Managing Director, Principal, and Client Advisor. Mr. Weitz also sits on the firm's Investment Committee. Prior to joining the firm, Mr. Weitz worked as a Portfolio Analyst at RegentAtlantic Capital, LLC.

Mr. Weitz has held the designation of Certified Financial Planner (CFP®) since 2013. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and

oversight by the CFP Board.

Mr. Weitz has held the Chartered Financial Analyst (CFA) designation since 2013. The CFA charter is a professional designation awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. In addition, CFA charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

### **Item 3 Disciplinary Information**

Mr. Weitz has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Weitz or Simon Quick Advisors, LLC.

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

- A. Mr. Weitz is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Mr. Weitz is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Mr. Weitz earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Weitz has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("*Act*"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Mr. Weitz is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

A.

**Garrett M. Wells**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer  
360 Mount Kemble Ave.  
Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Garrett Wells that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Garrett Wells was born in 1994. Mr. Wells graduated from the Steven Institute of Technology in 2017 with a Bachelor of Science degree in Business and Technology.

Mr. Wells joined the firm in 2017 and is currently a Vice President, Principal, and Client Advisor. Prior to joining the firm, Mr. Wells worked as a Consultant for First Derivatives Inc.

Mr. Wells has held the designation of Certified Financial Planner (CFP®) since 2020. The CFP® designation identifies individuals who have completed the mandatory examination, education, experience, and ethics requirements mandated by the CFP Board. Candidates must have at least three years of qualifying work experience that relates to financial planning. Candidates are required to hold a bachelor's degree from an accredited university. CFP® candidates must pass an examination that covers over 100 financial planning topics, which broadly include: general principles of financial planning, insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning. Finally, candidates have ongoing ethics requirements and oversight by the CFP Board.

### **Item 3 Disciplinary Information**

Mr. Wells has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Mr. Wells or Simon Quick Advisors, LLC.

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

- A. Mr. Wells is an equity owner and Principal of Simon Quick Advisors, LLC.
- B. Mr. Wells is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, Mr. Wells earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Mr. Wells has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

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**Item 1 Cover Page**

A.

**Patricia Yeager**

Simon Quick Advisors, LLC

**Form ADV Part 2B - Brochure Supplement  
Dated March 18, 2026**

Contact: Steve Pisano, Chief Compliance Officer

360 Mount Kemble Ave.

Morristown, NJ 07960

B.

**This Brochure Supplement provides information about Patricia Yeager that supplements the Simon Quick Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact Steve Pisano, Chief Compliance Officer, if you did *not* receive Simon Quick Advisors, LLC's Brochure or if you have any questions about the contents of this supplement at (973) 525-1000 or [spisano@simonquickadvisors.com](mailto:spisano@simonquickadvisors.com).**

**Item 2 Education Background and Business Experience**

Patricia Yeager was born in 1968. Ms. Yeager graduated from the University of West Florida in 1990 with a Bachelor of Science in Finance and a Master of Business Administration in 1991.

Ms. Yeager joined the firm as a Principal, Director, and Client Advisor in 2025, following a career as an Investment Analyst and Accredited Wealth Management Advisor at Merrill Lynch for many years. Ms. Yeager served as a Wealth Management Advisor for Proquility Private Wealth Partners from 2020 until May 2025, when Simon Quick Advisors, LLC acquired Proquility Private Wealth Partners.

Ms. Yeager has held the designation of Accredited Wealth Management Advisor (AWMA<sup>®</sup>) since 2014. The College for Financial Planning<sup>®</sup> awards the AWMA<sup>®</sup> designation to students who successfully complete the program, pass the final examination and comply with the Code of Ethics, which includes agreeing to abide by the *Standards of Professional Conduct and Terms and Conditions*. Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are

required to be disclosed. Continued use of the AWMA<sup>®</sup> designation is subject to ongoing renewal requirements. Every 2 years individuals must renew their right to continue using the AWMA<sup>®</sup> designation by completing 16 hours of continuing education and reaffirming to abide by the *Standards of Professional Conduct, Terms and Conditions*, and self-disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct.

### **Item 3 Disciplinary Information**

Ms. Yeager has not been involved in any legal or disciplinary events that would be material to a client's evaluation of Ms. Yeager or Simon Quick Advisors, LLC.

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

- A. Ms. Yeager is a Principal and equity owner of Simon Quick Advisors, LLC.
- B. Ms. Yeager is not actively engaged in any investment-related or non-investment-related business or occupation for compensation.

### **Item 5 Additional Compensation**

As a Principal and equity owner of Simon Quick Advisors, LLC, Ms. Yeager earns annual compensation from Simon Quick Advisors, LLC, which is based, in part, on the number of new clients and assets under management introduced to Simon Quick Advisors, LLC. Accordingly, Ms. Yeager has a conflict of interest when recommending that Simon Quick Advisors, LLC provide investment advisory services, because the recommendation could be made based on compensation to be received, rather than on a client or prospective client's best interests.

### **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisor's Act ("Act"). The Registrant's Chief Compliance Officer, Steve Pisano is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment advisor representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Pisano at (973) 525-1000. **Additional information about Ms. Yeager is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**