

This brochure supplement provides information about Sandy Moi that supplements the WPM Wealth Advisors LLC brochure. You should have received a copy of that brochure. Please contact Sandy Moi if you did not receive WPM Wealth Advisors LLC's brochure or if you have any questions about the contents of this supplement.

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

WPM Wealth Advisors LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Sandy Moi

Personal CRD Number: 3070347

Investment Adviser Representative

WPM Wealth Advisors LLC

139 Centre St PH138

New York, NY 10013

(212) 625-1188

smoicpa@wpmwealthadvisors.com

UPDATED: 02/28/2025

Item 2: Educational Background and Business Experience

Name: Sandy Moi **Born:** 1966

Educational Background and Professional Designations:

Education:

BBA Accounting, Baruch College - 1990

Professional Designations:

CPA - Certified Public Accountant

- 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.
- In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) 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.
- In addition to the Code of Professional Conduct, AICPA members who provide personal financial planning services are required to follow the Statement on Standards in Personal Financial Planning Services (SSPFPS).

Business Background:

05/2023 - Present

Investment Adviser Representative
WPM Wealth Advisors LLC

01/1998 - Present

Self-Employed
SANDY S. MOI, CPA LLC

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Sandy Moi is a manager at Sandy S. Moi, CPA LLC, Allsafe Insurance Brokerage Inc.

Sandy Moi is an accountant. From time to time, they may offer clients advice or products from those activities and clients should be aware that these services may involve a conflict of interest. WPM Wealth Advisors LLC always acts in the best interest of the client and clients always have the right to decide whether or not to utilize the services of any WPM Wealth Advisors LLC representative in such individual's outside capacities.

Item 5: Additional Compensation

Sandy Moi does not receive any economic benefit from any person, company, or organization, other than WPM Wealth Advisors LLC in exchange for providing clients advisory services through WPM Wealth Advisors LLC.

Item 6: Supervision

As a representative of WPM Wealth Advisors LLC, Sandy Moi is supervised by William Gamello, the firm's Chief Compliance Officer. William Gamello is responsible for ensuring that Sandy Moi adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for William Gamello is (518) 369-5232.