



Integrity Wealth Management, Inc
6323 Oak Cluster Dr
Greenwell Springs, LA 70739
www.integritywealth.us
Dated: Dec 31, 2019

This brochure provides information about the qualifications and business practices of Integrity Wealth Management, Inc. and its employees. If you have any questions about the contents of this brochure, please contact us at 225-926-0202 and/or mike.patton@integritywealth.us. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Integrity Wealth Management, Inc is available on the SEC's website at www.adviserinfo.sec.gov

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IV. ADVISORY BUSINESS

A. Company Overview

Integrity Wealth Management, Inc., is a Registered Investment Advisory firm which began operations on April 1, 2007. The principal owner is Michael J Patton, CFP[®], AEP, BCE, CTS, CMFC. IWM is a Registered Investment Advisory Firm and is subject to a *fiduciary legal standard*, which is the highest standard of care in the financial services industry. Unlike a broker or registered rep, we are obligated to place the interests of our clients ahead of our own, at all times. Although applicable at all times, this is especially relevant as it pertains to the advice we render to clients.

Our business philosophy is simple and is part of our Mission Statement. In short, we believe that focusing on providing high-quality advice and service, rather than on compensation, is not only ethical, it is a more prudent long-term business strategy. The rationale of this approach is that it will foster a more satisfied clientele, leading to increased client retention and more referrals. In short, we believe a company's revenue is a byproduct of quality advice and service, rather than the reverse. Thus, when clients are satisfied, the business will flourish, and the revenue will follow. This is because individuals are willing to pay a fee for advice if they are receiving value in return.

Finally, our business model is to work with a smaller number of affluent and high-net worth clients, which will enable us to deliver the quality of service clients desire.

B. Types of Services

Integrity Wealth Management, Inc. provides *comprehensive financial planning* and *portfolio management* services for affluent and high-net worth clients. In many cases, we serve as 'coordinator,' working with clients and their other advisors, as needed, to assist in the proper implementation of recommended strategies. As a result, many clients turn to us for advice on a wide range of issues. When a situation arises where the subject matter is outside the scope of our expertise, we will exercise our *duty to consult* with other professionals. If a consultation is not sufficient to provide a proper remedy, we will refer the client to the appropriate professional(s). The goal is that the client is properly advised.

NOTE: Our financial planning service is highly customized and will be discussed in detail.

C. Individualized Approach

Recognizing that facts and circumstances surrounding each client vary, we tailor our advice to suit the specific needs of each individual client. This often involves financial planning. We believe that the numbers tell the story, and just as a physician will conduct the appropriate tests prior to rendering a diagnosis, we will seek to analyze the client's situation, before rendering advice.

D. In House Wrap Fee Programs

We do not participate in Wrap Fee programs.

E. Assets Under Management

Assets under management as of Dec 31, 2019: \$30.1 million.

V. FEES AND COMPENSATION

A. Compensation

We are a "Fee-Only" firm and do not receive commissions at any time. Following, is a brief explanation of our financial planning and asset management services, and fee structure.

Financial Planning

Process: Here are the steps of our financial planning process.

- 1) Establish the process/expectations/fees, etc. for the relationship;

- 2) Gather required data;
- 3) Conduct research as needed, analyze the data, and create the individualized plan document;
- 4) Present the plan document and specific recommendations;
- 5) Create an implementation schedule and implement the recommendations; and
- 6) Monitor the progress toward goals and periodically update the financial plan. *

* Service is included as part of the Financial Planning Renewal Agreement

The financial planning process may also be divided into three phases.

- 1) Initial Phase (Steps 1-4)
- 2) Implementation Phase (Step 5)
- 3) Monitoring Phase (Step 6)

NOTE: We are on retainer to answer questions or provide advice on any topic that falls within the scope of the original plan agreement, for a period of one year. This 'retainer' period shall commence on the date of the initial financial planning engagement.

Initial Planning Fee: The initial fee includes the first 12-month period. Our fee for the comprehensive financial plan will vary, based on the complexity of the client's situation. We will provide a quote with the minimum and maximum fee at the onset of the planning relationship. The minimum fee is typically between \$1,000 to \$2,000.

Renewal Planning Fee: Since a financial plan is a static document with projections/forecasts based on a single point in time, regular updates are essential in monitoring one's progress toward goals. Although over 90% of clients choose to update their plan each year, this is an optional service. The fee for the second and subsequent years includes one financial plan update per 12-month period, a comparison with past financial plans, ongoing advice, and other miscellaneous services. The renewal fee ranges from \$200 to \$350 per calendar quarter, depending on the complexity of the case.

Asset Management

Our asset management philosophy is based on the premise that there is usually an investment opportunity somewhere. Thus, we seek to identify and capitalize on it. Our fee is a percentage of the assets under our management. **We do not charge commissions at any time.** Therefore, the number of transactions does not influence our revenue. Our compensation bears a direct link with the performance of the account. In short, our compensation increases only when the value of the portfolio rises. This *fee-only* approach aligns our interests with that of our clients. Finally, we divide our asset management into two distinct arrangements: Direct Management and Indirect Management.

Portfolio Management (Direct)

This is our most common arrangement. Under this arrangement, our custodian, Wells Fargo Clearing Services, holds the client's securities, issues all client statements and confirmations, executes the trades, and performs all other related duties. We are responsible for the day-to-day decisions, including creating and monitoring the risk/return characteristics of the client's portfolio, a thorough due diligence of the financial markets, a proper assessment of the client's willingness to assume risk, etc. In general, we do not accept new relationships of less than \$100,000 (note: this may be met with multiple accounts). However, we may make an exception in certain instances.

DIRECT MANAGEMENT FEE SCHEDULE

FEE SCHEDULE: PORTFOLIO MANAGEMENT-DIRECT	
Assets	Annual %
< \$100,000	1.30%
\$100,000 to \$249,999	1.20%
\$250,000 to \$499,999	1.10%
\$500,000 to \$999,999	0.80%
\$1,000,000 to \$1,999,999	0.65%
\$2,000,000 to \$2,999,999	0.55%
\$3,000,000 to \$4,999,999	0.40%
\$5,000,000 and above	negotiable

* Deducted monthly. Ex: 1.20% annually is 0.10% per month.

IMPORTANT: Under our Portfolio Management (Direct) arrangement our fee schedule *is not tiered*. For example, if a client has an \$800,000 IRA and a \$300,000 taxable account, **both under a Portfolio Management (Direct) agreement**, the total value would be \$1,100,000 and we would charge 0.65% from the first dollar (see schedule above: \$1,000,000 to \$1,999,999). We DO NOT charge 1.30% on the first \$100,000, then 1.20% on the next \$149,999, and 1.10% on the next \$249,999, etc. Our method results in a significantly lower fee.

Portfolio Management (Indirect)

In some situations, a client may desire investment advice, but is unable to transfer the account to our custodian. This may include an employer sponsored retirement plan such as a 401k, 403b, etc. In these situations, we will provide advice and oversight for a reduced fee. Under an Indirect arrangement, we will prepare a thorough analysis of the client's portfolio, perform the required due diligence, and provide prudent recommendations, using all investment options available. The client and/or their designee are responsible for implementing our recommendations. The fee for this service is included in the fee for financial planning services.

If the client HAS engaged our financial planning services and has an account that falls under an Indirect Management agreement, the fee schedule below applies. If the client HAS NOT engaged our financial planning services, we can negotiate an arrangement for this service.

Our fee schedule for "Indirect" Portfolio Management is as follows:

FEE SCHEDULE: PORTFOLIO MANAGEMENT-INDIRECT	
Assets	In Addition to Financial Planning Renewal Fee (Quarterly \$)
\$0 to \$249,999	+ \$100
\$250,000 to \$499,999	+ \$200
\$500,000 to \$999,999	+ \$300
\$1,000,000 to \$2,499,999	+ \$400
\$2,500,000 and above	+ \$500

Indirect Management Minimums

In general, there is no minimum account size for an Indirect Management agreement, provided the client has engaged us in a Direct Management agreement *plus* Financial Planning services. If the client has no other business with us, the minimum account size for Indirect Management is \$250,000, which can be satisfied with up to three accounts. If there are more than three accounts, we can discuss an alternative arrangement.

B. Method of Fee Payment

In general, we deduct fees from client accounts. However, we may bill separately if the client prefers. Fees are deducted on monthly basis for assets under a Direct Management agreement and quarterly under an Indirect Management agreement. To maximize the benefit to the client, in determining which account(s) the fee deduction will occur, we will consider the following:

- a. The client's income tax bracket;
- b. The client's ability to deduct advisory fees on IRS Form 1040 Schedule A (no longer applies due to the "Tax Cuts and Jobs Act" passed December 2017);
- c. The type of account (ex: taxable, IRA, Roth IRA, etc.)

C. Other Fees

Depending on the type of account and security purchased/sold, other fees may apply. They are listed in the following table. To reiterate, we are a "Fee-Only" firm and DO NOT receive commissions from the purchase or sale of any security, insurance product, etc.

Other Fees *		
Description	Amount	Note
Qualified Plan Custodial Fee (ex: IRA)	\$0.00 per year	
Mutual Fund, Stock and ETF Ticket Charge	\$0 to \$4.95 per trade	Many funds do not assess this fee.
Individual Bond Ticket Charge	\$25	Depends on the size of the bond.
Mutual Fund & ETF Expense Ratio	% varies by fund	This exists in ALL mutual funds & ETFs.
12(b)1 Fee	% varies by fund	Many funds do not charge this fee.

* IWM or its employees do not receive any portion of the fees in this table.

D. Timing of Fees

Asset management fees are deducted monthly, in advance, according to the guidelines set forth by the Securities and Exchange Commission (SEC). If an agreement is terminated in the middle of a fee cycle, all unused fees will be credited to the client on a pro-rata basis. All termination requests must be in writing and in compliance with our asset management agreement.

E. Compensation for the Purchase/Sale of Securities, including Commissions

We manage client assets on a fee-only basis and DO NOT receive any other fees or commissions.

VI. PERFORMANCE BASED FEES

We do not charge performance based fees.

VII. TYPES OF CLIENTS

Most of our clients are affluent or high net worth (HNW) individuals and include business owners, corporate executives, medical service providers, and retirees. Our business philosophy is to serve a smaller number of clients in order to preserve a high-level of personalized service.

Breakdown of Clientele	
Client Type	Percentage
High Net Worth Individuals	20-40%
Affluent Individuals	20-50%
Non-High Net Worth Individuals	0-10%
Pension and Profit Sharing Plans	0-5%
Trusts, Estates, or Charitable Organizations	0-10%

VIII. METHODS OF ANALYSIS, INVESTMENT STRATEGIES AND RISK OF LOSS

A. Methods of Analysis/Research

Economy

We believe certain aspects of the economy can have a strong effect on the financial markets and as such, we subscribe to multiple sources that provide a wide array of economic data on 190 of the 195 total countries worldwide. The need for reliable, accurate information has never been greater. This data, and these resources, are an invaluable tool, enhancing our decision-making process.

Financial Markets

The global investment universe is a massive and complex assortment of financial instruments. To stay current, we subscribe to several technological tools, all of which are specifically designed to assist advisors. Here is a short list and a quick description of two subscriptions.

Morningstar Advisor Workstation

This is a cloud-based system, which contains the available inventory of various investment vehicles. Here is a list of the type of investment and the approximate number of choices within each universe (as of February 2018).

- Mutual Funds (28,063)
- Exchange Traded Funds (2,165)
- U.S. Stocks (20,473)
- Separately Managed Accounts (9,051)
- Individual Bonds (2,487,883 million)
- Employer-Provided Retirement Plans, such as 401k plans (5,451)
- Variable Annuity Subaccounts (165,560)
- Closed-End Funds (621)
- 529 Plan Funds (4,824)
- Global Benchmarks (54,049)

MAW includes a significant amount of data for each instrument, robust analytical tools for comparison and research purposes, and a unique ability to prepare hypothetical portfolios in order to back-test various strategies.

YCharts.com

This is one of the most robust research and analytical tools on the market today. It is a cloud-based system filled with data on stocks, mutual funds, ETFs, and includes news, global economic data, a full array of indexes, and a state-of-the-art charting tool. In addition, it allows us to establish alarms on any security or economic data point, which can be very useful, especially during times of market turmoil.

B. Investment Strategies

The investment strategy we utilize depends on three key drivers. They are:

1. The account size;
2. The degree of risk the client is willing to assume; and
3. The target or required return the client needs to achieve to reach their goals (normally determined through the financial planning process).

Overview of Investment Philosophy

In general, we adhere to the following investment principles.

1. Minimize losses with a prudent risk-control process
2. Minimize fees
3. Purchase securities priced below their intrinsic value (buy low)
4. Avoid sector and single-security concentrations
5. Minimize stock overlap in funds
6. We use a mix of passive and active investments
7. Maintain a prudent level of diversification
8. Focus on the appropriate time horizon (avoid “short-term” thinking – focus on the long-term)

Fiduciary Scorecard ©

Due to the tremendous number of available mutual funds and ETFs, in late 2007, I developed a proprietary scoring methodology, which is called the Fiduciary Scorecard©. This is very different from screening and involves a very detailed process. The shortfall of using a screening process is simple. Let’s assume your screen searches for mutual funds in the Large Value category that have been in the top 50th percentile (in its peer group) for the previous 1-, 3-, and 5-year periods (ex: 1st percentile is best, 100th percentile is worst). If a fund was in the 51st percentile for one of the periods, it would be eliminated from the screen, even though it may be a very good fund. The Fiduciary Scorecard © provides a numerical score for each data point and a total score for the fund (100 is best, 0 is worst). Here is an overview of the process.

1. Incorporates 30+ data points on each fund or ETF
2. Compares the data to all funds in their respective peer group (Sub-Category)
3. Each data point receives a certain number of points (may be 0)
4. A Fiduciary Score is calculated for each fund (100 is best, 0 is worst)

Approximately four years after its creation (i.e. the testing period), I wrote an article about it, which was published in the November 2012 issue of Investment Advisor magazine. This tool has been refined and enhanced numerous times since its inception and it continues to evolve. Below is a table with a general description of the type of data used to create a Fiduciary Score.

Category	Description	# Data Points
Risk (Absolute)	How much has the fund fluctuated (positive and negative), compared to its peer group?	1
Risk/Return Profile	Has the fund’s return been adequate to compensate for the risk it has assumed?	4
Performance (Relative)	How does the fund rank within its peer group (over multiple periods)?	12
Performance (Pure)	How has the fund performed, compared to its peer group (over multiple periods)?	11
Stability	Has the fund’s management been stable or has there been a lot of turnover?	2
Expenses	What does the fund charge shareholders to operate (expense ratio)?	2

Note: All funds are compared to their specific peer group (Sub-Category) and scored accordingly.

Each data point carries a different weighting in the calculation of the final score. The more important the data, the greater its weight. Here is a sample Fiduciary Scorecard from February 2018.

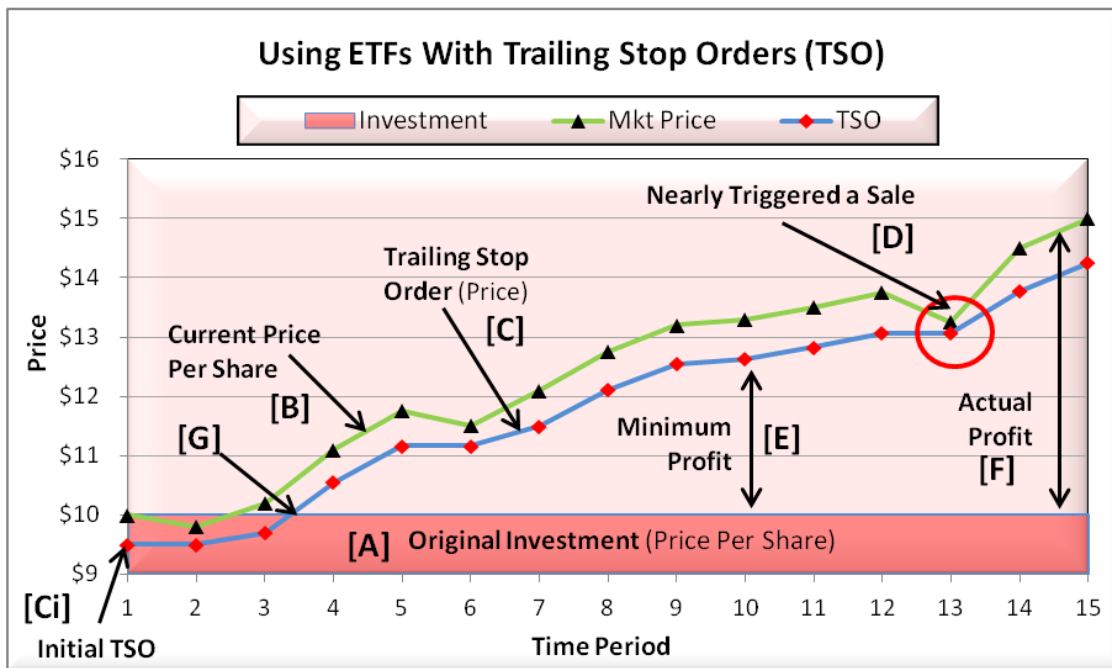
Description	TICKER	Broad Category	Sub-Category	% Data Availab	Points (Total)	Points (Bonu)	Points (Max Poss)	Fiduciary Score (Base)	Fiduciary Score (w/ Bonu)	Watch List Categor
PIMCO Income Instl	PIMIX	Bonds	US Fund Multisector Bond	100%	196	43	236	65%	83%	PASS +
Guggenheim Total Return Bond Instl	GIBIX	Bonds	US Fund Intermediate-Term Bond	100%	188	43	236	61%	80%	PASS +
Pioneer Bond Y	PICYX	Bonds	US Fund Intermediate-Term Bond	100%	187	38	236	63%	79%	PASS +
Goldman Sachs Intl Eq Insights Instl	GCIIX	Stocks	US Fund Foreign Large Blend	100%	186	43	236	60%	79%	PASS +
Janus Henderson US Managed Volatility N	JRSNX	Stocks	US Fund Large Blend	94%	177	43	225	59%	78%	PASS +
AQR Large Cap Defensive Style I	AUEIX	Stocks	US Fund Large Blend	97%	182	50	233	57%	78%	PASS +
Artisan International Value Instl	APHKX	Stocks	US Fund Foreign Large Blend	100%	183	35	236	63%	78%	PASS +
Lazard Global Listed Infrastructure Inst	GLIFX	Stocks	US Fund Infrastructure	100%	182	50	236	56%	77%	PASS +
Janus Henderson US Managed Volatility I	JRSIX	Stocks	US Fund Large Blend	100%	181	43	236	58%	77%	PASS +
Oppenheimer International Small-Mid Co Y	OSMYX	Stocks	US Fund Foreign Small/Mid Growth	100%	178	33	236	61%	75%	PASS +
Goldman Sachs Intl Sm Cp Insights Instl	GICIX	Stocks	US Fund Foreign Small/Mid Value	100%	177	38	236	59%	75%	PASS
Ave Maria Bond	AVEFX	Bonds	US Fund Intermediate-Term Bond	100%	176	33	236	60%	74%	PASS
AB Large Cap Growth I	ALLIX	Stocks	US Fund Large Growth	100%	175	41	236	57%	74%	PASS
American Century Emerging Markets R6	AEDMX	Stocks	US Fund Diversified Emerging Mkts	94%	166	40	225	56%	74%	PASS
Ivy Advantus Bond I	IVBIX	Bonds	US Fund Intermediate-Term Bond	100%	174	35	236	59%	74%	PASS
JHancock International Growth I	GOGIX	Stocks	US Fund Foreign Large Growth	100%	173	46	236	54%	73%	PASS
AB Bond Inflation Strategy I	ANBIX	Bonds	US Fund Inflation-Protected Bond	100%	173	38	236	57%	73%	PASS
Wells Fargo Special Small Cap Value Inst	ESPNX	Stocks	US Fund Small Value	100%	173	36	236	58%	73%	PASS
Janus Henderson Small Cap Value N	JDSNX	Stocks	US Fund Small Value	100%	173	43	236	55%	73%	PASS
Morgan Stanley Global Fixed Inc Opps I	DINDX	Bonds	US Fund World Bond	100%	172	38	236	57%	73%	PASS
MFS® Core Equity R4	MRGIX	Stocks	US Fund Large Blend	100%	171	35	236	58%	72%	PASS

A fund's Fiduciary Score determines the action taken. Here is a breakdown of the score, the watchlist category, and the action taken (where applicable). For example, if a fund scored between 30% and 40% (Category: Watch 2), we will call the fund company, speak to a fund manager (or appropriate representative) and inquire about its underperformance.

FIDUCIARY SCORECARD WATCHLIST CRITERIA		
Score	Category	Action Required
75% +	PASS +	
50% to 75%	PASS	
40% to 50%	Watch 1	Added to watchlist
30% to 40%	Watch 2	Call fund company
< 30%	Watch 3	Sell (unless there is a compelling reason against it)

Exchange Traded Funds (ETF)

Based on certain factors, we will use ETFs for most of a portfolio's stock exposure and mutual funds (and other securities) for the remainder. We favor ETFs in a taxable account because they typically DO NOT distribute capital gains each year as mutual funds are required to do. This fact makes ETFs more tax efficient than mutual funds. In addition, ETFs may be purchased or sold anytime during the trading day, while a mutual fund prices once, at the end of the day, regardless of when it was purchased or sold. In addition, to help protect against large losses, whenever we use a stock ETF, we may add a trailing stop order (TSO) to the position. Please refer to the following chart and the explanation below it.



Assume you purchased an ETF at \$10 per share [A]. To protect against a large loss, a TSO is added. In this example, we will use a 5.0% TSO. With a \$10.00 purchase price, the TSO would initially be set at \$9.50 [Ci]. Thus, if the price of the ETF fell to \$9.50, the ETF would sell and your loss would be limited to approximately 5.0%. However, if the price of the ETF rises, the TSO would also rise [C], maintaining its 5.0% margin beneath the current price per share [B]. If the price of the ETF declined, the TSO would remain unchanged, and would only begin to rise again, if the spread between the two reached 5.0%. You will notice in the example that the ETF nearly sold as the price per share came close to breaching the TSO [D]. Finally, your actual profit in this example would be the difference between your original price per share [A] and its current price per share [F]. Your "worst-case" scenario in this example would be the difference between the TSO price [C] and your original investment [A], represented by [E].

To summarize, this strategy works with stocks and ETFs, but not mutual funds. This is because mutual funds only price at the end of the trading day, whereas the price of an ETF or individual stock will fluctuate throughout the day. Therefore, we typically use this strategy on the riskier portion of a client's portfolio (i.e. stocks). In essence, this places a safety net under the more volatile positions, keeping losses to a predetermined minimum, and assuring a gain, when the price of the TSO rises above your initial purchase price [G]. Note: This strategy is typically used on accounts of \$100,000 or greater.

Individual Fixed Income Securities

We may include individual bonds in larger accounts. When selecting individual bonds, we will obtain quotes from at least two authorized bond dealers to assure we are receiving a competitive price. As an independent advisor, we are free to utilize any registered fixed-income dealer in the United States. Moreover, in our selection process, we will consider the following: credit quality, yield to maturity, yield to call (if callable), current price, other financial obligations of the issuing company, debt ratios, current financial structure, and any other information we deem relevant to the decision. When purchasing individual bonds, we prefer higher credit quality and will consider the interest rate environment at the time.

Other

We may utilize individual stocks if we believe the opportunity is favorable. However, picking individual stocks is not an integral part of the business.

NOTE: There is a risk of loss when investing in securities.

C. Material Risks of Investment Strategies

Certain investments are considered safe. These include U.S. government securities, bank deposits, CDs, money market funds, and a few others. However, for much of the investment universe, the possibility of loss exists. Even so, the chance of loss generally declines over time. Therefore, if you have an adequate time horizon, riskier assets may be appropriate. In short, higher risk requires a longer time horizon.

D. Risks Involved with Other Securities

As an independent advisory firm, we have access to a very broad spectrum of securities and are therefore, not limited, with respect to the types of securities we can utilize.

IX. PAST DISCIPLINARY ACTIONS

There have not been, nor are there currently, any disciplinary actions in process or pending against Integrity Wealth Management, its advisors, or anyone affiliated with IWM.

X. OTHER FINANCIAL INDUSTRY ACTIVITIES AND AFFILIATIONS

There are no other financial industry activities or affiliations to report.

VIII. CODE OF ETHICS, PARTICIPATION OR INTEREST IN CLIENT TRANSACTIONS AND PERSONAL TRADING

A copy of our code of ethics is available upon request. We have no conflicts of interest with respect to client trading and our trading. In the event we decide to purchase a security that we recommend to our clients, we will complete the client's trade at the same time or prior to ours.

XI. BROKERAGE PRACTICES

A. Factors in Selecting Broker-Dealers for Client Transactions

As of the date of this document, Wells Fargo Clearing Services (formerly, First Clearing Corp) holds all assets held under a Direct-Management agreement with IWM.

We have never, nor will we accept, "soft-dollar" funds from any third party under any circumstances. A common example of this includes gifts, meals, or money for marketing, from a representative or wholesaler of a family of mutual funds. This often comes with an expectation that you will sell their fund(s). To eliminate this conflict, and the perception of it, we do not engage in these activities, including an invitation for a free lunch. Therefore, there are no conflicts of interest to report. Moreover, there are no mark ups or markdowns through which we profit.

B. Brokerage for Client Referrals

N/A

C. Directed Brokerage

We do not recommend, request, or require that a client direct us to execute transactions through a specified broker-dealer. Note: Not all advisors require their clients to direct brokerage.

XII. REVIEW OF ACCOUNTS

A. Frequency of Review

Accounts: We monitor each account on a regular basis and offer account reviews to clients on demand. Clients may elect to meet with us in person to review their account(s) or via an online meeting. During the review, we will examine and report on the following: account performance, allocation of account, individual holdings, the strategy(s) utilized, an overview of the global and U.S. economy, a fiduciary scorecard on their mutual funds and ETFs, the gains and losses on each position, and other relevant items. Review materials are available in print or electronically. All reviews are conducted by Michael J. Patton, CFP.

Financial Plans: We will generally review and update the client's financial plan on an annual basis. When applicable, we will compare each update with past plans in order to measure the client's progress toward their goals. All updates are available in print or in an electronic format.

XIII. CLIENT REFERRALS AND OTHER COMPENSATION

We receive the majority of our clients from referrals. We do not pay for referrals or receive any economic benefit from making a referral. Therefore, this does not present a conflict of interest.

XIV. CUSTODY OF ASSETS

All assets are held at Wells Fargo Clearing Services, (formerly First Clearing Corp). Clients will receive account statements directly from WFCS monthly if there is account activity or quarterly if no activity is present. Clients should carefully review each statement for accuracy.

XV. INVESTMENT DISCRETION

We manage client assets on a discretionary basis. In general, a client may impose limitations on this such as avoiding certain types of securities. This is clearly explained in our Investment Management Agreement.

XVI. VOTING CLIENT SECURITIES

We do not vote client securities. Clients will receive proxy notices from WFCS, the transfer agent, or from IWM.

XVII. FINANCIAL INFORMATION

N/A

Form ADV Part 2B: Brochure Supplement

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This supplement is dated December 31, 2019

This brochure supplement provides information about Michael J. Patton that supplements the Integrity Wealth Management, Inc. brochure. You should have received a copy of that brochure. Please contact Michael J Patton if you did not receive Integrity Wealth Management's brochure or if you have any questions about its content.

**Additional information about Michael J. Patton is available on the SEC's website at
www.adviserinfo.sec.gov**

I. Educational Background and Business Experience

A. Supervised Person

Michael J. Patton

B. Date of Birth

November 9, 1957

C. Age

62

D. Formal Education after High School

College for Financial Planning
Denver, CO

E. Business Background

Prior to forming Integrity Wealth Management, Michael held positions with various financial services firms and banks including, Merrill Lynch, J.P. Morgan, and Mascoma Savings Bank (located in New Hampshire and Vermont). He has been the President of Integrity Wealth Management since its inception, April 1, 2007.

Published Works

Forbes.com: Senior Contributor

- Writes a column five times per month (2009 to present)
- Target Audience: General Public
- Total Page Views: 5.25 Million +
- Topics include the economy, the financial markets, the Fed, etc.

ThinkAdvisor.com: Contributing Blogger

- Wrote a weekly blog for financial professionals, entitled “The Road to Independence” (Sept 2007 to Aug 2016; Dec 2017 to April 2019)
- Wrote the column “Under the Hood” in 2015
- Contributing Editor with Investment Advisor magazine (2007 through 2016)
- Topics include the financial markets, operating a financial services business, financial planning issues, etc.

F. Professional Designations

Certified Financial Planner (CFP)

Completion Date: April 14, 1996

Michael was required to pass six, three-hour exams *plus* a two-day, 10-hour final examination. In 2017, the final exam had a pass rate of 64%.

The individual modules are as follows:

- Module I-General Principles of Financial Planning (incl. cash flow and net worth)
- Module II-Insurance and Risk Management
- Module III-Investment Management
- Module IV-Taxation
- Module V-Retirement Planning
- Module VI-Estate Planning

The final exam is a mixture of multiple choice and essay. A score of 70% or higher is required *for each* exam. In addition, there is an ongoing continuing education requirement of 30 hours every two years, which includes a mandatory two-hour course on ethics.

Accredited Estate Planner (AEP)

Completion Date: August 26, 2003

There are certain prerequisites required to attain this designation. Each applicant must be a qualified attorney (JD), a CPA, a CFP, a ChFC, a CLU, or a CTFA. In addition, the applicant must have a minimum of five years of experience in estate planning and a formal recommendation from a practicing estate-planning attorney (JD). After meeting the requirements, the applicant must pass two three-hour, masters-level exams.

Board Certified in Estate Planning (BCE)

Completion Date: January 9, 2006

Each applicant must complete a 60 hour, six-module course, have a minimum of two years' experience in the financial services industry, and complete a written, estate plan, case study. In addition, there is an ongoing continuing education requirement.

Certified Tax Specialist (CTS)

Completion Date: December 2, 2006

Each applicant must complete a six-module, three-exam curriculum, and a written case study on taxation. The individual modules are as follows:

Module I-The Individual Tax Return

Module II-Business Expenses, Retirement Plans, and Self-Employed and Employee Expenses

Module III-Itemized Deductions, Incentives, Credits, and Special Taxes

Module IV-Accounting Periods and Depreciation Methods

Module V-Capital Gains and Losses

Module VI-Estimated Tax Payments, Payroll Taxes, Tax Administration and Planning

A score of 70% or higher is required for each module. Each applicant must have a minimum of 2,000 hours of work experience in the financial services industry.

Chartered Mutual Fund Counselor (CMFC)

Completion Date: January 2001

Each applicant must pass one three-hour exam covering all aspects of mutual fund investing, including ethics.

II. Past Disciplinary Actions

There have not been any, nor are there any current or pending, disciplinary actions against Michael J. Patton or any employee, past or present, of Integrity Wealth Management, Inc.