

*This brochure supplement provides information about Douglas Michael Sheahan that supplements the ICCF Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Douglas Michael Sheahan if you did not receive ICCF Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Douglas Michael Sheahan is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

# **ICCF Wealth Management, LLC**

## **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**Douglas Michael Sheahan**

Personal CRD Number: 4163719

Investment Adviser Representative

ICCF Wealth Management, LLC  
1331 Palmetto Ave., Suite 120  
Winter Park, FL 32789  
(321) 527-3807  
<http://www.iccfwm.com>  
[doug.sheahan@iccfwm.com](mailto:doug.sheahan@iccfwm.com)

UPDATED: 11/17/2023

## Item 2: Educational Background and Business Experience

**Name:** Douglas Michael Sheahan **Born:** 1976

### **Educational Background and Professional Designations:**

#### **Education:**

MBA Finance, Stetson University - 2004

Bachelor of Science Business, Miami University - 1998

#### **Business Background:**

12/2022 - Present	Licensed Insurance Agent ICCF Wealth Management, LLC
11/2017 - Present	Managing Member & CCO ICCF Wealth Management, LLC
10/2012 - 12/2022	Licensed Insurance Agent Insurance Consultants of Central Florida
10/2016 - 11/2017	Advisor Platinum Wealth Partners
10/2012 - 10/2016	Advisor Concert Wealth Management
09/2008 - 10/2012	Advisor Morgan Stanley Smith Barney
01/2008 - 08/2008	Recruiter VACO
02/2005 - 11/2007	Project Manager Lennar Homes

### **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**

Douglas Michael Sheahan is a licensed insurance agent. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. ICCF Wealth Management, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of ICCF Wealth Management, LLC in their capacity as a licensed insurance agent.

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

Douglas Michael Sheahan does not receive any economic benefit from any person, company, or organization, other than ICCF Wealth Management, LLC in exchange for providing clients advisory services through ICCF Wealth Management, LLC.

### **Item 6: Supervision**

As the Chief Compliance Officer of ICCF Wealth Management, LLC, Douglas Michael Sheahan supervises all activities of the firm. Douglas Michael Sheahan's contact information is on the cover page of this disclosure document. Douglas Michael Sheahan adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

## Item 7: Requirements For State Registered Advisers

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

A. Douglas Michael Sheahan has NOT been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.

B. Douglas Michael Sheahan has NOT been the subject of a bankruptcy.