

Aspen Trail Wealth Management, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Christopher Dunlevy

Personal CRD Number: 4909656

Investment Adviser Representative

March 2024

Aspen Trail Wealth Management, LLC
2700 S. Woodlands Village Blvd. 300-195
Flagstaff, AZ, 86001
(480) 993-9668
cd@aspenwealth.com

This brochure supplement provides information about Christopher Dunlevy that supplements the Aspen Trail Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Christopher Dunlevy if you did not receive Aspen Trail Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

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

Item 2: Educational Background and Business Experience

Name: Christopher Dunlevy

Born: 1977

Educational Background and Professional

Designations: Education:

Bachelor of Science Psychology, Northern Arizona University - 2000

Business Background:

05/2013 - Present	President Aspen Trail Wealth Management, LLC
02/2014 - Present	Agent Aspen Trail Benefits & Insurance, LLC
11/2013 - 07/2015	Investment Advisor Representative/Registered Representative Lincoln Financial Advisors
12/2008 - 09/2013	Registered Representative Cuso Financial Services, LP
12/2006 - 09/2013	Program Manager Arizona Federal Financial Solutions
01/2005 - 12/2007	Registered Representative New York Life

Item 3: Disciplinary Information

Attached is a hyperlink to access the legal history of the advisor. The BrokerCheck link is www.finra.org/brokercheck; the IAPD link is www.adviserinfo.sec.gov. Once you enter the links, use the search bar to either search by name or CRD number.

Item 4: Other Business Activities

No outside business activities to report.

Item 5: Additional Compensation

Christopher Dunlevy does not receive any economic benefit from any person, company, or organization, other than Aspen Trail Wealth Management, LLC in exchange for providing clients advisory services through Aspen Trail Wealth Management, LLC.

Item 6: Supervision

As the only owner and representative of Aspen Trail Wealth Management, LLC, Christopher Dunlevy supervises all activities of the firm. He can be contacted directly at (480) 993-9668. Christopher Dunlevy's response information is on the cover page of this disclosure document. Christopher Dunlevy adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.

Item 7: Requirements For State Registered Advisers

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

- A. Christopher Dunlevy 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
 - 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
 - e) dishonest, unfair, or unethical practices
- B. Christopher Dunlevy has not been the subject of a bankruptcy petition in the past ten years.