

# Brochure Supplement

April 24, 2023

## CHARLES MARKS

1 Park Place, Office Building 1, Ste 500  
Annapolis, Maryland 21401

(410) 934-1199

This Brochure Supplement provides information about Charles Marks that supplements the Disclosure Brochure of Marks Wealth, LLC (hereinafter “Marks Wealth Management”), a copy of which you should have received. Please contact Marks Wealth Management’s Chief Compliance Officer if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Charles Marks is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Marks Wealth, LLC, a Registered Investment Adviser**

1 Park Place, Office Building 1, Ste 500, Annapolis, Maryland 21401 | (410) 934-1199

## Item 2. Educational Background and Business Experience

Born 1988

### Post-Secondary Education

Salisbury University | B.S., Marketing | 2010

### Recent Business Background

Marks Wealth, LLC | Chief Executive Officer and Investment Adviser Representative | September 2020– Present

Wells Fargo Advisors, LLC | Managing Director and Investment Adviser Representative | October 2015 – September 2020

Bank of America | Financial Advisor | December 2011– September 2015

Morgan Stanley | Financial Advisor | January 2011 – June 2011

## Item 3. Disciplinary Information

Marks Wealth Management is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Charles Marks. Marks Wealth Management has no information to disclose in relation to this Item.

## Item 4. Other Business Activities

Marks Wealth Management is required to disclose information regarding any investment-related business or occupation in which Charles Marks is actively engaged.

Charles Marks is not engaged in any investment-related business or occupation (other than this advisory firm).

## **Item 5. Additional Compensation**

Marks Wealth Management is required to disclose information regarding any arrangement under which Charles Marks receives an economic benefit from someone other than a client for providing investment advisory services. Marks Wealth Management has no information to disclose in relation to this Item.

## **Item 6. Supervision**

Charles Marks is the Sole owner and Chief Compliance Officer of Marks Wealth Management and is generally responsible for his own supervision. Charles Marks seeks to ensure that investments are suitable for his individual clients and consistent with their individual needs, goals, objectives and risk tolerance, as well as any restrictions requested by Marks Wealth Management's clients.