

# Brochure Supplement

OCTOBER 28, 2021

## Samuel J. Trecaso

3560 West Market Street, Suite 340  
Akron, OH 44333

(234) 260-6953

This Brochure Supplement provides information about Samuel J. Trecaso that supplements the Disclosure Brochure of Wells Trecaso Financial Group, LLC (hereinafter "WTFG"), a copy of which you should have received. Please contact WTFG'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 Samuel J. Trecaso is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Wells Trecaso Financial Group, LLC, a Registered Investment Adviser**

3560 West Market St. Ste 340, Akron, OH 44333 | 330-414-6873  
[www.wellstrecaso.com](http://www.wellstrecaso.com)

## Item 2. Educational Background and Business Experience

Born 1996

### Post-Secondary Education

University of Akron | Masters of Science., Education | 2014

University of Akron | B.S., Education | 2013

### Recent Business Background

Wells Trecaso Financial Group, LLC | Investment Associate | October 2021 – Present

SupplyOne | Account Executive | October 2017 – October 2021

Oswald Company | Group Benefits Sales Associate | April 2017 – June 2017

Pasquilina's II | Assistant Manager | July 2016 – April 2017

## Item 3. Disciplinary Information

WTFG is required to disclose information regarding any legal or disciplinary events material to a client's evaluation of Samuel J. Trecaso. WTFG has no information to disclose in relation to this Item.

## Item 4. Other Business Activities

WTFG is required to disclose information regarding any investment-related business or occupation in which Samuel J. Trecaso is actively engaged. WTFG has no information to disclose in relation to this Item.

## Item 5. Additional Compensation

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

## Item 6. Supervision

Christopher Walters, Chief Compliance Officer, is generally responsible for supervising Samuel J. Trecaso's advisory activities on behalf of WTFG. Christopher Walters can be reached at the firm's main telephone number listed on the cover page of this Brochure Supplement.

WTFG supervises its personnel and the investments made in client accounts. WTFG monitors the investments recommended by Samuel J. Trecaso to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. WTFG periodically reviews the advisory activities of Samuel J. Trecaso, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Samuel J. Trecaso.