This brochure supplement provides information about Christopher Habedank that supplements the Naples Asset Management Co., LLC brochure. You should have received a copy of that brochure. Please contact Paul McIntyre if you did not receive Naples Asset Management Co., LLC's brochure or if you have any questions about the contents of this supplement.

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

NAMCOA®
Registered Investment Advisor
Naples Asset Management Company®, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Christopher Habedank

Personal CRD Number: 6135571

Investment Adviser Representative

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WEBSITE: infinitewealthadvisors.com
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chabedank@namcoa.com

Updated: 4/09/2024

Item 2: Educational Background and Business Experience

Name: Christopher Habedank **Born:** 1983

Education:

- NASAA: Series 65 (Investment Adviser Law) 2024
- Chartered Retirement Planning Counselor (CRPC®) - 2019
- Bachelor of Science (BS), Finance, University of South Florida, Tampa, FL - 2010

Business Background:

- 2024 – Present | Investment Advisor Representative, NAMCOA (Naples Asset Management Co., LLC)
- 2019 – Present | Client Relationship Manager, Infinite Wealth Advisors, LLC.
- 2013 – 2019 | Investment Education and Asset Allocation Specialist, T. Rowe Price
- 2012 – 2013 | Financial Services Associate, T. Rowe Price
- 2011 – 2012 | Loss Mitigation Specialist, Law Offices of Daniel C. Consuegra.

Current Examinations & Licenses:

- NASAA: Series 65 (Investment Adviser Law) 2024
- Chartered Retirement Planning Counselor (CRPC®) 2019
- Life, Annuity and Health Insurance licensed in the following states: NC and TX.

Current Professional Designations: Chartered Retirement Planning Counselor (CRPC®)

Christopher Habedank has been awarded the **Chartered Retirement Planning Counselor (CRPC®)** designation from the **College for Financial Planning.** Website www.cffp.edu.

Chartered Retirement Planning Counselor (designation, signifying Christopher Habedank's in-depth knowledge and experience in crafting personalized retirement strategies. The CRPC® program equips Christopher to navigate the complexities of retirement planning for individuals, ensuring a smooth transition from pre-retirement to a secure and fulfilling post-retirement life.

- **Retirement Income Planning:** Christopher possesses the skills to develop sustainable retirement income streams, considering factors like employer-sponsored plans, Social Security benefits, individual retirement accounts (IRAs), and investment strategies.

- **Tax-Advantaged Strategies**: Christopher can help optimize retirement savings by leveraging tax-efficient plans like IRAs and 401(k)s, minimizing tax burden throughout the retirement journey.

- **Social Security Maximization:** Christopher understands the intricacies of Social Security claiming strategies and can be a guide in maximizing benefits based on specific circumstances.

- **Healthcare Planning**: Retirement healthcare costs can be significant. Christopher can assist in incorporating healthcare considerations into retirement plans, including potential Medicare options and long-term care planning.

- **Estate Planning Integration:** The CRPC® program emphasizes the importance of integrating estate planning within the overall retirement strategy. Christopher can work collaboratively with estate planning attorneys to ensure assets are distributed according to clients' wishes while minimizing potential tax implications for heirs.

- **Retirement Lifestyle Planning**: Retirement is more than just finances. Christopher can help explore ways to translate financial security into a fulfilling post-retirement life that aligns with clients' goals and aspirations.

Item 3: Disciplinary Information

Christopher Habedank had a civil event that we believe is not material to a client's or prospective client's evaluation of this advisory business. In 2016, Chris was subject to a civil judgment from the U.S. Department of Education related to his student loan. He has maintained a 100% on-time payment record throughout the repayment process.

Item 4: Other Business Activities

Christopher Habedank is a licensed insurance agent. From time to time, he will offer clients advice or products, or conduct market research 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. Naples Asset Management Co., 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 Naples Asset Management Co., LLC in their capacity as a licensed insurance agent.

Item 5: Additional Compensation

Christopher Habedank does not receive any economic benefit from any person, company, or organization, other than as described above, in exchange for providing clients advisory services.

Item 6: Supervision

As a representative of Naples Asset Management Co., LLC, Christopher Habedank is supervised by Paul McIntyre, the firm's Chief Compliance Officer. Paul McIntyre is responsible for ensuring that Chris Habedank adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Paul McIntyre is (239) 287-3789.

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