This brochure supplement provides information about Patrice Aileen Lancelot that supplements the Bright Futures Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Patrice Aileen Lancelot if you did not receive Bright Futures Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Patrice Aileen Lancelot is also available on the SEC's website at www.adviserinfo.sec.gov.

# Bright Futures Wealth Management, LLC

Form ADV Part 2B - Individual Disclosure Brochure

for

### **Patrice Aileen Lancelot**

Personal CRD Number: 2108431 Investment Adviser Representative

> Bright Futures Wealth Management, LLC 2850 Clover Street, Suite 2 Pittsford, NY 14534 (585) 427-2420 patrice.lancelot@ceteraadvisors.com

## Item 2: Educational Background and Business Experience

Name: Patrice Aileen Lancelot Born: 1948

**Educational Background and Professional Designations:** 

### **Education:**

BA Foreign Language, Ithaca College - 1970

### **Designations:**

#### ChFC®- Chartered Financial Consultant®

#### ChFC® MINIMUM QUALIFICATIONS:

- Bachelor's degree or its equivalent, in any discipline, from an accredited university, this qualifies as one year of business experience
- Three years of full-time business experience is required; this three-year period must be within the five years preceding the date of the award (part-time qualifying business experience is also credited toward the three-year requirement with 2,000 hours representing the equivalent of one year full-time experience).
- Must fulfill the ChFC® seven course curriculum, as well as two additional elective courses
- Pass the exams for all required and elective courses
- Pass a background check and candidate fitness standards test. You must reveal any criminal
  history, pending litigation or ethical violations. The CFP board verifies all employment history,
  qualifications and disciplinary issues via FINRA's Central Registration Depository.

### **Business Background:**

03/2017 - Present	Investment Advisor Representative
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Bright Futures Wealth Management, LLC

04/2011 - Present Financial Advisor

Cetera

12/2008 - 04/2011 Financial Advisor

**Ensemble Financial Services** 

03/2001 - 12/2008 Financial Advisor

Preferred Financial Group

### **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**

Patrice Aileen Lancelot is not engaged in any investment-related business or occupation (other than this advisory firm).

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

In addition to advisory fees, Patrice Aileen Lancelot earns sales incentives or awards from Cetera based on the value of assets under management, investment products sold, number of sales, client referrals, amount of new deposits or amount of new accounts at Cetera.

Patrice Aileen Lancelot also receives forgivable loans from Cetera, which are conditioned on Patrice Aileen Lancelot retaining Cetera's broker-dealer and/or registered investment advisor services. This additional economic benefit creates a conflict of interest for Patrice Aileen Lancelot to retain affiliation with Cetera in order to avoid repayment on a loan. Cetera Advisors and Bright Futures Wealth Management, LLC. maintain Code of Ethics requiring Patrice Aileen Lancelot to always act in your best interest and maintain a supervisory structure to monitor the advisory activities of Bright Futures Wealth Management, LLC in order to reduce potential conflicts of interest.

Bright Futures Wealth Management, LLC does not provide indirect compensation such as sale credits, forgivable loans or others mentioned above to Patrice Aileen Lancelot.

## **Item 6: Supervision**

As a representative of Bright Futures Wealth Management, LLC, Patrice Aileen Lancelot is supervised by Craig LeFeber, the firm's Chief Compliance Officer. Craig LeFeber is responsible for ensuring that Patrice Aileen Lancelot 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 Craig LeFeber is (585) 305-8518.