



WESTON FINANCIAL

Susan K. Arnold, CFP®

Weston Financial Group, Inc.

100 William Street, Suite 200

Wellesley, MA 02481

781-235-7055

www.westonfinancial.net

February 27, 2017

This Brochure Supplement provides information about Susan K. Arnold that supplements Weston Financial's Brochure. You should have received a copy of that Brochure. Please contact Nicole M. Tremblay at 781-235-7055 or ntremblay@westonfinancial.net if you did not receive Weston Financial's Brochure or if you have any questions about the contents of this Supplement.

Additional information about Susan K. Arnold is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Susan K. Arnold (Year of birth: 1959)

Professional Designation: CFP® practitioner *

Educational Background:

Lake Forest College, Lake Forest, IL, B.A. Biology

Bentley University, Waltham, MA, M.S. Personal Financial Planning

Ms. Arnold is a Vice President and Senior Financial Counselor and has been with Weston Financial (the "Advisor") since 1993. She is a CFP® practitioner and a voting member of the Advisor's Investment Committee. Susan works with high net worth individuals and corporate executives to develop goal oriented financial plans. She also works with her clients on corporate benefit, investment portfolio and tax strategies. She develops long term client relationships through listening and understanding her client needs and financial goals. She received a B.A. in Biology from Lake Forest College and a Masters of Science in Personal Financial Planning from Bentley University.

Business Experience:

Weston Financial Group, Inc., Wellesley, MA

Vice President 8/2005 to Present

Senior Financial Counselor 06/2000 to Present

*** CERTIFIED FINANCIAL PLANNER™**

The program is administered by the Certified Financial Planner Board of Standards, Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards.

Item 3 - Disciplinary Information

There are no legal or disciplinary items applicable to a client's or prospective client's evaluation of Ms. Arnold. Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Item 4 - Other Business Activities

Ms. Arnold is a Registered Representative of Weston Securities Corporation ("WSC"), a licensed broker-dealer and sister company to the Advisor and a wholly-owned subsidiary of Washington Trust Bancorp, Inc. In addition, Ms. Arnold is the President of The Park Insurance Agency, Inc. ("Park"), a wholly-owned subsidiary of the Advisor.

WSC acts as an introducing broker-dealer for the placement of securities for certain mutual funds, life and variable annuities, 529 College Savings Plans, and limited partnerships, and as the principal underwriter and distributor for New Century Portfolios, a registered investment company. In addition, Park is an insurance agency that facilitates the placement of fixed annuities and life insurance policies. The Advisor may recommend or manage client investments in such products and as such, Ms. Arnold may receive compensation based, in part, on investment advisor fees paid to the Advisor and on

commissions, trailers and/or 12b-1 fees or service fees (“Trailers”), and insurance commissions for products and services offered by WSC and Park, respectively. This compensation is independent of her fixed annual salary and Ms. Arnold is also entitled to receive distributions from the Advisor’s net profits pursuant to a defined bonus program and is compensated based, in part, on the value of assets held in a Portfolio or private account she manages. In addition, she is compensated, on a percentage basis, for financial planning and tax return services. Further, Ms. Arnold’s employer also receives payments for placing such investments through the Advisor, WSC or Park.

The Advisor has policies and procedures in place to ensure that the products recommended by Ms. Arnold are based on the individual needs and objectives of the client rather than on any compensation that may be received.

Employees of the Advisor may invest in their own personal accounts. As such, the personnel may buy or sell securities also recommended to clients. To deal with any conflicts of interest, the Advisor has adopted a Code of Ethics and Statement for Insider Trading. The Code of Ethics contains provisions reasonably necessary to deter misconduct, conflicts of interest and to detect any trading violations. The Advisor has in place an Insider Trading Statement which bars trading on material non-public information. A summary of the Code of Ethics is located in the Advisor’s Brochure and the full Code of Ethics will be provided upon request.

Item 5 - Additional Compensation

Ms. Arnold does not receive compensation from any outside entity other than as disclosed above in “Other Business Activities.”

Item 6 - Supervision

Ms. Arnold’s investment advisory activities are supervised by **John W. Filoon, III (“Jake”)**; President and Chief Operating Officer of the Advisor. Mr. Filoon monitors the investment advice provided to clients by Ms. Arnold through routine communications with Ms. Arnold. In addition, Mr. Filoon meets regularly with Ms. Arnold to discuss business goals and objectives. Further, Mr. Filoon may periodically participate in client meetings and may also sample various communications provided to clients.

If you should have any questions regarding the supervision or the activities performed by Ms. Arnold; **Jake Filoon**, President and Chief Operating Officer, can be reached at jwfiloon@westonfinancial.net or at 781-235-7055 x 7801.

Every employee has a responsibility for knowing and following the Advisor’s policies and procedures. Every person in a supervisory role is also responsible for those individuals under his/her supervision. Supervision is evidenced by periodic meetings with the supervising principal and the supervised person as well as independent annual reviews by the Compliance Department. Nicole M. Tremblay, Esq.; Senior Vice President and Chief Compliance Officer (the “CCO”), has the overall responsibility for monitoring and testing compliance with the Firm’s policies and procedures. Possible violations of these policies or procedures will be documented and reported to the appropriate department manager for remedial action. Repeated violations, or violations that the CCO deems to be of serious nature, will be reported by the CCO directly to the President, or a similarly designated officer, and/or the Advisor’s Board of Directors and/or investment companies’ Board of Trustees.



WESTON FINANCIAL

Matthew D. Biggar, CFP[®], CFA[®]

Weston Financial Group, Inc.

100 William Street, Suite 200

Wellesley, MA 02481

781-235-7055

www.westonfinancial.net

February 27, 2017

This Brochure Supplement provides information about Matthew D. Biggar that supplements Weston Financial's Brochure. You should have received a copy of that Brochure. Please contact Nicole M. Tremblay at 781-235-7055 or ntremblay@westonfinancial.net if you did not receive Weston Financial's Brochure or if you have any questions about the contents of this Supplement.

Additional information about Matthew D. Biggar is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Matthew D. Biggar (Year of birth: 1977)

Professional Designations: CFP® practitioner * and CFA® charterholder **

Educational Background:

Babson College, Wellesley, MA, B.S. Business Administration
Bentley University, Waltham, MA, M.S. Taxation

Matt is a Vice President and Senior Financial Counselor and has been with Weston Financial (the “Advisor”) since 2001. He is a CFA® charterholder, as well as a CFP® practitioner. Matt is a voting member of the Advisor’s Investment Committee. Matt’s specialty is working with executives to maximize the value of their corporate benefits. Matt takes a goal-oriented approach in designing a financial plan that best utilizes a client’s corporate benefits and net worth to meet their personal objectives. Matt graduated Magna Cum Laude and with High Distinction from the Academic Honors Program at Babson College, where he received a B.S. in Business Administration. Matt received his Masters in Taxation at Bentley University. Matt is a member of the CFA Institute, as well as the Boston Security Analyst Society.

Business Experience:

Weston Financial Group, Inc., Wellesley, MA
Vice President, Senior Financial Counselor 3/2011 to Present
Vice President 6/2010 to Present
Financial Counselor 1/2007 to 3/2011
Senior Financial Associate 8/2005 to 1/2007
Financial Associate 3/2001 to 8/2005

*** CERTIFIED FINANCIAL PLANNER™**

The program is administered by the Certified Financial Planner Board of Standards, Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board’s code of ethics and professional responsibility and financial planning standards.

**** CHARTERED FINANCIAL ANALYST®**

This designation is offered by the CFA Institute (formerly the Association for Investment Management and Research (AIMR)). To obtain the CFA charter, candidates must successfully complete three difficult exams and gain at least four (4) years of qualifying work experience, among other requirements. In passing these exams, candidates demonstrate their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.

Item 3 - Disciplinary Information

There are no legal or disciplinary items applicable to a client’s or prospective client’s evaluation of Mr. Biggar. Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Item 4 - Other Business Activities

Mr. Biggar is a Registered Representative of Weston Securities Corporation (“WSC”), a licensed broker-dealer and sister company to the Advisor and a wholly-owned subsidiary of Washington Trust Bancorp, Inc. In addition, Mr. Biggar is an insurance agent with The Park Insurance Agency, Inc. (“Park”), a wholly-owned subsidiary of the Advisor.

WSC acts as an introducing broker-dealer for the placement of securities for certain mutual funds, life and variable annuities, 529 College Savings Plans, and limited partnerships, and as the principal underwriter and distributor for New Century Portfolios, a registered investment company. In addition, Park is an insurance agency that facilitates the placement of fixed annuities and life insurance policies. The Advisor may recommend or manage client investments in such products and as such, Mr. Biggar may receive compensation based, in part, on investment advisor fees paid to the Advisor and on commissions, trailers, and/or 12b-1 fees or service fees (“Trailers”) and insurance commissions for placing business through WSC or Park respectively. This compensation is independent of his fixed annual salary and Mr. Biggar is also entitled to receive distributions from the Advisor’s net profits pursuant to a defined bonus program and he is compensated based, in part, on the value of assets held in a Portfolio or private accounts he manages. In addition, he is compensated, on a percentage basis, for financial planning and tax return services. Further, Mr. Biggar’s employer also receives payments for placing such investments through the Advisor, WSC or Park.

The Advisor has policies and procedures in place to ensure that the products recommended by Mr. Biggar are based on the individual needs and objectives of the client rather than on any compensation that may be received.

Employees of the Advisor may invest in their own personal accounts. As such, the personnel may buy or sell securities also recommended to clients. To deal with any conflicts of interest, the Advisor has adopted a Code of Ethics and Statement for Insider Trading. The Code of Ethics contains provisions reasonably necessary to deter misconduct, conflicts of interest and to detect any trading violations. The Advisor has in place an Insider Trading Statement which bars trading on material non-public information. A summary of the Code of Ethics is located in the Advisor’s Brochure and the full Code of Ethics will be provided upon request.

Item 5 - Additional Compensation

Mr. Biggar does not receive compensation from any outside entity other than as disclosed above in “Other Business Activities.”

Item 6 - Supervision

Mr. Biggar is supervised by **John W. Filoon, III (“Jake”)**; President and Chief Operating Officer of the Advisor. Mr. Filoon monitors the investment advice provided to clients by Mr. Biggar through routine communications with Mr. Biggar. In addition, Mr. Filoon meets regularly with Mr. Biggar to discuss business goals and objectives. Further, Mr. Filoon may periodically participate in client meetings and may also sample various communications provided to clients.

If you should have any questions regarding the supervision or the activities performed by Mr. Biggar; **Jake Filoon**, President and Chief Operating Officer, can be reached at jwfiloon@westonfinancial.net or at 781-235-7055.

Every employee has a responsibility for knowing and following the Advisor's policies and procedures. Every person in a supervisory role is also responsible for those individuals under his/her supervision. Supervision is evidenced by periodic meetings with the supervising principal and the supervised person as well as independent annual reviews by the Compliance Department. Nicole M. Tremblay, Esq.; Senior Vice President and Chief Compliance Officer (the "CCO"), has the overall responsibility for monitoring and testing compliance with the Firm's policies and procedures. Possible violations of these policies or procedures will be documented and reported to the appropriate department manager for remedial action. Repeated violations, or violations that the CCO deems to be of serious nature, will be reported by the CCO directly to the President, or a similarly designated officer, and/or the Advisor's Board of Directors and/or investment companies' Board of Trustees.



WESTON FINANCIAL

Drew J. Bottaro, CFP®

Weston Financial Group, Inc.

100 William Street, Suite 200

Wellesley, MA 02481

781-235-7055

www.westonfinancial.net

February 27, 2017

This Brochure Supplement provides information about Drew J. Bottaro that supplements Weston Financial's Brochure. You should have received a copy of that Brochure. Please contact Nicole M. Tremblay at 781-235-7055 or ntremblay@westonfinancial.net if you did not receive Weston Financial's Brochure or if you have any questions about the contents of this Supplement.

Additional information about Drew J. Bottaro is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Drew J. Bottaro (Year of birth: 1951)

Professional Designation: CFP® professional *

Educational Background:

Massachusetts Institute of Technology, Cambridge, MA, S.B. Economics
Boston University School of Law, Boston, MA, J.D.

Drew rejoined Weston Financial (the "Advisor") on October 11, 2011 as a Vice President, Senior Financial Counselor, having served in that role from 1986 to 1989. He is a CFP® professional and a voting member of the Advisor's Investment Committee. In the interim, he served as a Senior Vice President with Wells Fargo Family Wealth (formerly Wachovia/Calibre and Tanager Financial), COO and Senior Advisor at Pillar Financial, and as Director at Deloitte. Drew's client service experience has predominantly been with high-net-worth and ultra-high-net-worth clients, with an emphasis in estate planning, investments, taxation, and financial planning. Drew works with clients to provide strategic advice on income and estate tax, asset allocation, investments and risk management. Drew is a member of the Massachusetts Bar. He graduated from the Massachusetts Institute of Technology with an S.B. in Economics and minors in Psychology and Literature; and Boston University School of Law with a Juris Doctorate degree.

Business Experience:

Weston Financial Group, Inc., Wellesley, MA

Vice President, Senior Financial Counselor 10/11/11 to Present

Wells Fargo Family Wealth (formerly Wachovia-Calibre/formerly Tanager Financial), Waltham, MA

Senior Vice President and Director, Client Services 3/2004 to 4/2011

Pillar Financial Advisors, Inc., Waltham, MA

COO and Senior Advisor 1/2001 to 3/2004

Deloitte, Boston, MA

Director, 1997; Senior Tax Manager, 1992; Manager, 1989

*** CERTIFIED FINANCIAL PLANNER™**

The program is administered by the Certified Financial Planner Board of Standards, Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards.

Item 3 - Disciplinary Information

There are no legal or disciplinary items applicable to a client's or prospective client's evaluation of Mr. Bottaro. Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Item 4 - Other Business Activities

Mr. Bottaro is a Registered Representative of Weston Securities Corporation (“WSC”), a licensed broker-dealer and sister company to the Advisor and a wholly-owned subsidiary of Washington Trust Bancorp, Inc. In addition, Mr. Bottaro is an insurance agent with The Park Insurance Agency, Inc. (“Park”), a wholly-owned subsidiary of the Advisor.

WSC acts as an introducing broker-dealer for the placement of securities for certain mutual funds, variable annuities, 529 College Savings Plans, and limited partnerships, and as the principal underwriter and distributor for New Century Portfolios, a registered investment company. In addition, Park is an insurance agency that facilitates the placement of fixed annuities and life insurance policies. The Advisor may recommend or manage client investments in such products and as such, Mr. Bottaro may receive compensation based, in part, on investment advisor fees paid to the Advisor and on commissions, trailers and/or 12b-1 fees or service fees (“Trailers”) and insurance commissions for products and services offered by WSC and Park respectively. This compensation is independent of his fixed annual salary and Mr. Bottaro is entitled to receive distributions from the Advisor’s net profits pursuant to a defined bonus program and is compensated based, in part, on the value of assets held in a Portfolio or private account that he manages. In addition, he is compensated, on a percentage basis, for financial planning and tax return services. Further, Mr. Bottaro’s employer also receives payments for placing such investments through the Advisor, WSC or Park.

The Advisor has policies and procedures in place to ensure that the products recommended by Mr. Bottaro are based on the individual needs and objectives of the client rather than on any compensation that may be received.

Employees of the Advisor may invest in their own personal accounts. As such, the personnel may buy or sell securities also recommended to clients. To deal with any conflicts of interest, the Advisor has adopted a Code of Ethics and Statement for Insider Trading. The Code of Ethics contains provisions reasonably necessary to deter misconduct, conflicts of interest and to detect any trading violations. The Advisor has in place an Insider Trading Statement which bars trading on material non-public information. A summary of the Code of Ethics is located in the Advisor’s Brochure and the full Code of Ethics will be provided upon request.

In addition, Mr. Bottaro spends approximately thirty to forty hours per month, during the semesters in which he teaches a financial planning class, as an Adjunct Assistant Professor of Financial Planning at Bentley University, Waltham MA. This part-time teaching position does not present a conflict of interest and the compensation he receives does not provide a substantial source of his income.

Item 5 - Additional Compensation

Mr. Bottaro does not receive compensation from any outside entity other than as disclosed above in “Other Business Activities.”

Item 6 - Supervision

Mr. Bottaro is supervised by **John W. Filoon, III (“Jake”)**; President and Chief Operating Officer of the Advisor. Mr. Filoon monitors the investment advice provided to clients by Mr. Bottaro through routine communications with Mr. Bottaro. In addition, Mr. Filoon meets regularly with Mr. Bottaro to discuss business goals and objectives. Further, Mr. Filoon may periodically participate in client meetings and may also sample various communications provided to clients.

If you should have any questions regarding the supervision or the activities performed by Mr. Bottaro; **Jake Filoon**, President and Chief Operating Officer, can be reached at jwfiloon@westonfinancial.net or at 781-235-7055.

Every employee has a responsibility for knowing and following the Advisor's policies and procedures. Every person in a supervisory role is also responsible for those individuals under his/her supervision. Supervision is evidenced by periodic meetings with the supervising principal and the supervised person as well as independent annual reviews by the Compliance Department. Nicole M. Tremblay, Esq.; Senior Vice President and Chief Compliance Officer (the "CCO"), has the overall responsibility for monitoring and testing compliance with the Firm's policies and procedures. Possible violations of these policies or procedures will be documented and reported to the appropriate department manager for remedial action. Repeated violations, or violations that the CCO deems to be of serious nature, will be reported by the CCO directly to the President, or a similarly designated officer, and/or the Advisor's Board of Directors and/or investment companies' Board of Trustees.



WESTON FINANCIAL

Kerry P. Falco, CPA

Weston Financial Group, Inc.

100 William Street, Suite 200

Wellesley, MA 02481

781-235-7055

www.westonfinancial.net

February 27, 2017

This Brochure Supplement provides information about Kerry P. Falco that supplements Weston Financial's Brochure. You should have received a copy of that Brochure. Please contact Nicole M. Tremblay at 781-235-7055 or ntremblay@westonfinancial.net if you did not receive Weston Financial's Brochure or if you have any questions about the contents of this Supplement.

Additional information about Kerry P. Falco is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Kerry P. Falco (Year of birth: 1960)

Professional Designation: CPA *

Educational Background:

University of Vermont, Burlington, VT, B.S.

Bentley University, Waltham, MA, M.S. Taxation

Kerry has been with Weston Financial (the "Advisor") since 1985 and has been a Senior Financial Counselor since 1991 and a Managing Director since 2009. He is a voting member of the Advisor's Investment Committee and serves as the Chief Financial Officer and Financial Operations Principal ("FinOP") to the Firm's securities business (Weston Securities Corporation). Kerry works primarily with executives and senior managers from Fortune 500 companies, and provides strategic advice on income and estate tax, asset allocation, investments and risk management. He graduated from the University of Vermont with a B.S. degree in Business Administration, and received a Masters in Taxation, with High Distinction, at Bentley University. He is a licensed member of the Massachusetts Society of CPAs.

Business Experience:

Weston Financial Group, Inc., Wellesley, MA

Managing Director 5/2009 to Present

Senior Financial Counselor 1991 to Present

Vice President 8/2005 to 5/2009

*** CERTIFIED PUBLIC ACCOUNTANT**

A CPA is a professional licensed to practice public accounting. The State Board of Accountancy determines the laws and rules for practitioners in each state. In Massachusetts, the Massachusetts Board of Public Accountancy has established educational requirements in financial accounting, audit, management accounting and taxes. To become certified, candidates must pass a four (4) part Uniform CPA Examination, and obtain three (3) years work experience in public accounting. Licensed practitioners are required to complete annual Continuing Professional Education (CPE) in subjects that vary with the type of license and area of employment.

Item 3 - Disciplinary Information

There are no legal or disciplinary items applicable to a client's or prospective client's evaluation of Mr. Falco. Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Item 4 - Other Business Activities

Mr. Falco is a General Securities Principal and FinOP of Weston Securities Corporation ("WSC"), a licensed broker-dealer and sister company to the Advisor and a wholly-owned subsidiary of Washington Trust Bancorp, Inc. In addition, Mr. Falco is an insurance agent with The Park Insurance Agency, Inc. ("Park"), a wholly-owned subsidiary of the Advisor.

WSC acts as an introducing broker-dealer for the placement of securities for certain mutual funds, life and variable annuities, 529 College Savings Plans, and limited partnerships, and as the principal underwriter

and distributor for New Century Portfolios, a registered investment company. In addition, Park is an insurance agency that facilitates the placement of fixed annuities and life insurance policies. The Advisor may recommend or manage client investments in such products and as such,

Mr. Falco may receive compensation based, in part, on investment advisor fees paid to the Advisor and on commissions, trailers and/or 12b-1 fees or service fees (“Trailers”) and insurance commissions for products and services offered by WSC and Park respectively. This compensation is independent of his fixed annual salary and Mr. Falco is entitled to receive distributions from the Advisor’s net profits pursuant to a defined bonus program and is compensated based, in part, on the value of assets held in a Portfolio or private account that he manages. In addition, he is compensated, on a percentage basis, for financial planning and tax return services. Further, Mr. Falco’s employer also receives payments for placing such investments through the Advisor, WSC or Park.

The Advisor has policies and procedures in place to ensure that the products recommended by Mr. Falco are based on the individual needs and objectives of the client rather than on any compensation that may be received.

Employees of the Advisor may invest in their own personal accounts. As such, the personnel may buy or sell securities also recommended to clients. To deal with any conflicts of interest, the Advisor has adopted a Code of Ethics and Statement for Insider Trading. The Code of Ethics contains provisions reasonably necessary to deter misconduct, conflicts of interest and to detect any trading violations. The Advisor has in place an Insider Trading Statement which bars trading on material non-public information. A summary of the Code of Ethics is located in the Advisor’s Brochure and the full Code of Ethics will be provided upon request.

Item 5 - Additional Compensation

Mr. Falco does not receive compensation from any outside entity other than as disclosed above in “Other Business Activities.”

Item 6 - Supervision

Mr. Falco is supervised by **John W. Filoon, III (“Jake”)**; President and Chief Operating Officer of the Advisor. Mr. Filoon monitors the investment advice provided to clients by Mr. Falco through routine communications with Mr. Falco. In addition, Mr. Filoon meets regularly with Mr. Falco to discuss business goals and objectives. Further, Mr. Filoon may periodically participate in client meetings and may also sample various communications provided to clients.

If you should have any questions regarding the supervision or the activities performed by Mr. Falco; **Jake Filoon**, President and Chief Operating Officer, can be reached at jwfiloon@westonfinancial.net or at 781-235-7055 x 7801.

Every employee has a responsibility for knowing and following the Advisor’s policies and procedures. Every person in a supervisory role is also responsible for those individuals under his/her supervision. Supervision is evidenced by periodic meetings with the supervising principal and the supervised person as well as independent annual reviews by the Compliance Department. Nicole M. Tremblay, Esq.; Senior Vice President and Chief Compliance Officer (the “CCO”), has the overall responsibility for monitoring and testing compliance with the Firm’s policies and procedures. Possible violations of these policies or procedures will be documented and reported to the appropriate department manager for remedial action. Repeated violations, or violations that the CCO deems to be of serious nature, will be reported by the CCO directly to the President, or a similarly designated officer, and/or the Advisor’s Board of Directors and/or investment companies’ Board of Trustees.



WESTON FINANCIAL

Andre M. Fernandes, CFP®

Weston Financial Group, Inc.

100 William Street, Suite 200

Wellesley, MA 02481

781-235-7055

www.westonfinancial.net

February 27, 2017

This Brochure Supplement provides information about Andre M. Fernandes that supplements Weston Financial's Brochure. You should have received a copy of that Brochure. Please contact Nicole M. Tremblay at 781-235-7055 or ntremblay@westonfinancial.net if you did not receive Weston Financial's Brochure or if you have any questions about the contents of this Supplement.

Additional information about Andre M. Fernandes is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Andre M. Fernandes (Year of birth: 1978)

Professional Designation: CFP® practitioner *

Educational Background:

Bentley University, Waltham, MA, B.S. Finance

Completed the CFP® Professional Education Program at the College for Financial Planning

Andre is a Vice President and Senior Financial Counselor and has been with Weston Financial (the "Advisor") since 2000. He is a CFP® practitioner and a voting member of the Advisor's Investment Committee. Andre is responsible for counseling high net worth individuals and corporate executives to construct and implement comprehensive financial plans, which include the use of customized investment, tax, and estate planning strategies. He particularly enjoys employing a collaborative approach to the planning process and, in doing so, specializes in not only providing planning solutions but also educating clients while helping them meet their financial goals. He received a B.S. in Finance from Bentley University and completed the CFP® Professional Education Program at the College for Financial Planning. Andre volunteers his time and is an active member of the board for Mansfield Youth Soccer and was previously a member of the financial committee of the Portuguese American Scholarship Foundation.

Business Experience:

Weston Financial Group, Inc., Wellesley, MA

Senior Financial Counselor 3/2011 to Present

Vice President 6/2010 to Present

Financial Counselor 1/2007 to 3/2011

Senior Financial Associate 8/2005 to 1/2007

Financial Associate 6/2000 to 8/2005

*** CERTIFIED FINANCIAL PLANNER™**

The program is administered by the Certified Financial Planner Board of Standards, Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards.

Item 3 - Disciplinary Information

There are no legal or disciplinary items applicable to a client's or prospective client's evaluation of Mr. Fernandes. Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Item 4 - Other Business Activities

Mr. Fernandes is a Registered Representative of Weston Securities Corporation ("WSC"), a licensed broker-dealer and sister company to the Advisor and a wholly-owned subsidiary of Washington Trust Bancorp, Inc. In addition, Mr. Fernandes is an insurance agent with The Park Insurance Agency, Inc. ("Park"), a wholly-owned subsidiary of the Advisor.

WSC acts as an introducing broker-dealer for the placement of securities for certain mutual funds, life and variable annuities, 529 College Savings Plans and limited partnerships, and serves as the principal

underwriter and distributor for New Century Portfolios, a registered investment company. In addition, Park is an insurance agency that facilitates the placement of fixed annuities and life insurance policies. The Advisor may recommend or manage client investments in such products, and as such, Mr. Fernandes is entitled to receive compensation, based, in part, on investment advisor fees paid to the Advisor; and on commissions, trailers, and/or 12b-1 fee or service fees (“Trailers”); and insurance commissions for placing business through WSC or Park respectively. This compensation is independent of his fixed annual salary and Mr. Fernandes is entitled to receive distributions from the Advisor’s net profits pursuant to a defined bonus program and is compensated based, in part, on the value of assets held in a Portfolio or private account that he manages. In addition, he is compensated, on a percentage basis, for financial planning and tax return services. Further, Mr. Fernandes’ employer also receives payments for placing such investments through the Advisor, WSC or Park.

The Advisor has policies and procedures in place to ensure that the products recommended by Mr. Fernandes are based on the individual needs and objectives of the client rather than on any compensation that may be received.

Employees of the Advisor may invest in their own personal accounts. As such, the personnel may buy or sell securities also recommended to clients. To deal with any conflicts of interest, the Advisor has adopted a Code of Ethics and Statement for Insider Trading. The Code of Ethics contains provisions reasonably necessary to deter misconduct, conflicts of interest and to detect any trading violations. The Advisor has in place an Insider Trading Statement which bars trading on material non-public information. A summary of the Code of Ethics is located in the Advisor’s Brochure and the full Code of Ethics will be provided upon request.

Item 5 - Additional Compensation

Mr. Fernandes does not receive compensation from any outside entity other than as disclosed above in “Other Business Activities.”

Item 6 - Supervision

Mr. Fernandes’ investment advisory activities are supervised by **John W. Filoon, III (“Jake”)**; President and Chief Operating Officer of the Advisor. Mr. Filoon monitors the investment advice provided to clients by Mr. Fernandes through routine communications with Mr. Fernandes. In addition, Mr. Filoon meets regularly with Mr. Fernandes to discuss business goals and objectives. Further, Mr. Filoon may periodically participate in client meetings and may also sample various communications provided to clients. If you should have any questions regarding the supervision or the activities performed by Mr. Fernandes; **Jake Filoon**, President and Chief Operating Officer, can be reached at jwfiloon@westonfinancial.net or at 781-235-7055.

Every employee has a responsibility for knowing and following the Advisor’s policies and procedures. Every person in a supervisory role is also responsible for those individuals under his/her supervision. Supervision is evidenced by periodic meetings with the supervising principal and the supervised person as well as independent annual reviews by the Compliance Department. Nicole M. Tremblay, Esq.; Senior Vice President and Chief Compliance Officer (the “CCO”), has the overall responsibility for monitoring and testing compliance with the Firm’s policies and procedures. Possible violations of these policies or procedures will be documented and reported to the appropriate department manager for remedial action. Repeated violations, or violations that the CCO deems to be of serious nature, will be reported by the CCO directly to the President, or a similarly designated officer, and/or the Advisor’s Board of Directors and/or investment companies’ Board of Trustees.



WESTON FINANCIAL

Ronald D. Halterman, CFP[®], CLU[®]

Weston Financial Group, Inc.

100 William Street, Suite 200

Wellesley, MA 02481

781-235-7055

www.westonfinancial.net

February 27, 2017

This Brochure Supplement provides information about Ronald D. Halterman that supplements Weston Financial's Brochure. You should have received a copy of that Brochure. Please contact Nicole M. Tremblay at 781-235-7055 or ntremblay@westonfinancial.net if you did not receive Weston Financial's Brochure or if you have any questions about the contents of this Supplement.

Additional information about Ronald D. Halterman is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Ronald D. Halterman (Year of birth: 1982)

Professional Designations: CFP® practitioner * and CLU® **

Educational Background:

Assumption College, Worcester, MA, B.A. Marketing

Ronald is an Assistant Vice President and Associate Counselor and has been with Weston Financial (the "Advisor") since 2008. He is a CFP® practitioner, has achieved the CLU® designation, and is a voting member of the Advisor's Investment Committee. Ronald works directly with high net worth individuals and corporate executives to provide customized financial plans, investment strategies, estate planning, and tax planning advice; while also providing support to Senior Financial Counselors in creating complex planning solutions for clients. He also serves as Vice President and Assistant Portfolio Manager of the New Century Alternative Strategies Portfolio. Ronald holds a B.A. degree in Marketing, with a minor in Theology, from Assumption College.

Business Experience:

Weston Financial Group, Inc., Wellesley, MA
Assistant Vice President 9/16 to Present
Associate Counselor 2/2013 to Present
Assistant Portfolio Manager 8/2011 to Present
Senior Financial Associate 4/2008 to 2/2013

John Hancock Financial Network, Westborough, MA
Investment Advisor Representative

*** CERTIFIED FINANCIAL PLANNER™**

The program is administered by the Certified Financial Planner Board of Standards, Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards.

**** CHARTERED LIFE UNDERWRITER®**

CLU® is a designation granted by the American College to individuals who have completed training in life insurance and personal insurance planning. To obtain the designation, individuals have to complete advanced courses and exams in several topics including insurance, investments, taxation, employee benefits, estate planning, accounting, management and economics.

Item 3 - Disciplinary Information

There are no legal or disciplinary items applicable to a client's or prospective client's evaluation of Mr. Halterman. Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Item 4 - Other Business Activities

Mr. Halterman is a Registered Representative of Weston Securities Corporation (“WSC”), a licensed broker-dealer and sister company to the Advisor and a wholly-owned subsidiary of Washington Trust Bancorp, Inc. In addition, Mr. Halterman is an insurance agent with The Park Insurance Agency, Inc. (“Park”), a wholly-owned subsidiary of the Advisor.

WSC acts as an introducing broker-dealer for the placement of securities for certain mutual funds, variable annuities, 529 College Savings Plans, and limited partnerships, and as the principal underwriter and distributor for New Century Portfolios, a registered investment company. In addition, Park is an insurance agency that facilitates the placement of fixed annuities and life insurance policies. The Advisor may recommend or manage client investments in such products and as such, Mr. Halterman may receive compensation based, in part, on investment advisor fees paid to the Advisor and on commissions, trailers and/or 12b-1 fees or service fees (“Trailers”) and insurance commissions for products and services offered by WSC and Park respectively. This compensation is independent of his fixed annual salary and Mr. Halterman is entitled to receive distributions from the Advisor’s net profits pursuant to a defined bonus program and is compensated based, in part, on the value of assets held in a Portfolio or private account that he manages. In addition, he is compensated, on a percentage basis, for financial planning and tax return services. Further, Mr. Halterman’s employer also receives payments for placing such investments through the Advisor, WSC or Park.

The Advisor has policies and procedures in place to ensure that the products recommended by Mr. Halterman are based on the individual needs and objectives of the client rather than on any compensation that may be received.

Employees of the Advisor may invest in their own personal accounts. As such, the personnel may buy or sell securities also recommended to clients. To deal with any conflicts of interest, the Advisor has adopted a Code of Ethics and Statement for Insider Trading. The Code of Ethics contains provisions reasonably necessary to deter misconduct, conflicts of interest and to detect any trading violations. The Advisor has in place an Insider Trading Statement which bars trading on material non-public information. A summary of the Code of Ethics is located in the Advisor’s Brochure and the full Code of Ethics will be provided upon request.

Item 5 - Additional Compensation

Mr. Halterman does not receive compensation from any outside entity other than as disclosed above in “Other Business Activities.”

Item 6 - Supervision

Mr. Halterman is supervised by **Ronald A. Sugameli**, Managing Director, Chief Investment Officer and Secretary of the Advisor. Mr. Sugameli monitors the investment advice provided to clients by Mr. Halterman through routine communications with Mr. Halterman. In addition, Mr. Sugameli meets regularly with Mr. Halterman to discuss business goals and objectives. Further, Mr. Sugameli may periodically participate in client meetings and may also sample various communications provided to clients.

If you should have any questions regarding the supervision or the activities performed by Mr. Halterman; **Ronald A. Sugameli**, Managing Director, Chief Investment Officer and Secretary, can be reached at rsugameli@westonfinancial.net or at 781-235-7055 x 7824.

Every employee has a responsibility for knowing and following the Advisor's policies and procedures. Every person in a supervisory role is also responsible for those individuals under his/her supervision. Supervision is evidenced by periodic meetings with the supervising principal and the supervised person as well as independent annual reviews by the Compliance Department. Nicole M. Tremblay, Esq.; Senior Vice President and Chief Compliance Officer (the "CCO"), has the overall responsibility for monitoring and testing compliance with the Firm's policies and procedures. Possible violations of these policies or procedures will be documented and reported to the appropriate department manager for remedial action. Repeated violations, or violations that the CCO deems to be of serious nature, will be reported by the CCO directly to the President, or a similarly designated officer, and/or the Advisor's Board of Directors and/or investment companies' Board of Trustees.



WESTON FINANCIAL

William F. LeFavor, CFP®

Weston Financial Group, Inc.

100 William Street, Suite 200

Wellesley, MA 02481

781-235-7055

www.westonfinancial.net

February 27, 2017

This Brochure Supplement provides information about William F. LeFavor that supplements Weston Financial's Brochure. You should have received a copy of that Brochure. Please contact Nicole M. Tremblay at 781-235-7055 or ntremblay@westonfinancial.net if you did not receive Weston Financial's Brochure or if you have any questions about the contents of this Supplement.

Additional information about William F. LeFavor is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

William F. LeFavor (Year of birth: 1983)

Professional Designation: CFP® practitioner *

Educational Background:

Bentley University, Waltham, MA, B.S. Economics-Finance

Bentley University, Waltham, MA, M.S. Financial Planning, Graduate Certificate in Taxation

Will is a Vice President and Financial Counselor and has been with Weston Financial (the “Advisor”) since 2005. He is a CFP® practitioner and a voting member of the Advisor’s Investment Committee. Will is responsible for counseling high net worth families and corporate executives to create and implement comprehensive financial plans. The comprehensive planning includes investment management, retirement planning, estate planning and tax planning advice. He particularly enjoys engaging with clients to provide a clear solution and an overall understanding of the plan and decisions required to achieve their financial goals. He also serves as Vice President and Assistant Portfolio Manager of the New Century Capital, Balanced and International Portfolios. Will graduated from Bentley University, Cum Laude, with a B.S. in Economics-Finance. He also earned his Master’s of Science in Financial Planning from Bentley University, graduating with Highest Distinction. Will volunteers his time with and is a member of the Bentley University Service-Learning Alumni organization.

Business Experience:

Weston Financial Group, Inc., Wellesley, MA

Vice President, Financial Counselor 5/2013 to Present

Associate Counselor 1/2011 to 5/2013

Senior Financial Associate 6/2006 to 1/2011

Financial Associate 5/2005 to 6/2006

*** CERTIFIED FINANCIAL PLANNER™**

The program is administered by the Certified Financial Planner Board of Standards, Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board’s code of ethics and professional responsibility and financial planning standards.

Item 3 - Disciplinary Information

There are no legal or disciplinary items applicable to a client’s or prospective client’s evaluation of Mr. LeFavor. Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Item 4 - Other Business Activities

Mr. LeFavor is a Registered Representative of Weston Securities Corporation (“WSC”), a licensed broker-dealer and sister company to the Advisor and a wholly-owned subsidiary of Washington Trust Bancorp, Inc. In addition, Mr. LeFavor is an insurance agent with The Park Insurance Agency, Inc. (“Park”), a wholly-owned subsidiary of the Advisor.

WSC acts as an introducing broker-dealer for the placement of securities for certain mutual funds, variable annuities, 529 College Savings Plans, and limited partnerships, and as the principal underwriter and distributor for New Century Portfolios, a registered investment company. In addition, Park is an insurance agency that facilitates the placement of fixed annuities and life insurance policies. The Advisor may recommend or manage client investments in such products and as such, Mr. LeFavor may receive compensation based, in part, on

investment advisor fees paid to the Advisor; and on commissions, trailers, and/or 12b-1 fee or service fees (“Trailers”); and insurance commissions for placing business through WSC or Park, respectively. This compensation is independent of his fixed annual salary and Mr. LeFavor is also entitled to receive distributions from the Advisor’s net profits pursuant to a defined bonus program and is compensated based, in part, on the value of assets held in a Portfolio or private account he manages. In addition, he is compensated, on a percentage basis, for financial planning and tax return services. Further, Mr. LeFavor’s employer also receives payments for placing such investments through the Advisor, WSC or Park.

The Advisor has policies and procedures in place to ensure that the products recommended by Mr. LeFavor are based on the individual needs and objectives of the client rather than on any compensation that may be received.

Employees of the Advisor may invest in their own personal accounts. As such, the personnel may buy or sell securities also recommended to clients. To deal with any conflicts of interest, the Advisor has adopted a Code of Ethics and Statement for Insider Trading. The Code of Ethics contains provisions reasonably necessary to deter misconduct, conflicts of interest and to detect any trading violations. The Advisor has in place an Insider Trading Statement which bars trading on material non-public information. A summary of the Code of Ethics is located in the Advisor’s Brochure and the full Code of Ethics will be provided upon request.

Item 5 - Additional Compensation

Mr. LeFavor does not receive compensation from any outside entity other than as disclosed above in “Other Business Activities.”

Item 6 - Supervision

Mr. LeFavor is supervised by **John W. Filoon, III (“Jake”)**; President and Chief Operating Officer of the Advisor. Mr. Filoon monitors the investment advice provided to clients by Mr. LeFavor through routine communications with Mr. LeFavor. In addition, Mr. Filoon meets regularly with Mr. LeFavor to discuss business goals and objectives. Further, Mr. Filoon may periodically participate in client meetings and may also sample various communications provided to clients.

If you should have any questions regarding the supervision or the activities performed by Mr. LeFavor; **Jake Filoon**, President and Chief Operating Officer, can be reached at jwfiloon@westonfinancial.net or at 781-235-7055 x 7801.

Every employee has a responsibility for knowing and following the Advisor’s policies and procedures. Every person in a supervisory role is also responsible for those individuals under his/her supervision. Supervision is evidenced by periodic meetings with the supervising principal and the supervised person as well as independent annual reviews by the Compliance Department. Nicole M. Tremblay, Esq.; Senior Vice President and Chief Compliance Officer (the “CCO”), has the overall responsibility for monitoring and testing compliance with the Firm’s policies and procedures. Possible violations of these policies or procedures will be documented and reported to the appropriate department manager for remedial action. Repeated violations, or violations that the CCO deems to be of serious nature, will be reported by the CCO directly to the President, or a similarly designated officer, and/or the Advisor’s Board of Directors and/or investment companies’ Board of Trustees.



WESTON FINANCIAL

Walter H. Riester, Jr., CFP®

Weston Financial Group, Inc.

100 William Street, Suite 200

Wellesley, MA 02481

781-235-7055

www.westonfinancial.net

February 27, 2017

This Brochure Supplement provides information about Walter H. Riester that supplements Weston Financial's Brochure. You should have received a copy of that Brochure. Please contact Nicole M. Tremblay at 781-235-7055 or ntremblay@westonfinancial.net if you did not receive Weston Financial's Brochure or if you have any questions about the contents of this Supplement.

Additional information about Walter H. Riester is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Walter H. Riester, Jr. (Year of birth: 1961)

Professional Designation: CFP® practitioner *

Educational Background:

Colgate University, Hamilton, NY, B.A. Economics

New York University Stern School of Business, New York, NY, MBA, Finance

Completed the CFP® Professional Education Program at Boston University

Walter is an Assistant Vice President and Associate Counselor and has been with Weston Financial (the "Advisor") since 1997. He is a CFP® practitioner and a voting member of the Advisor's Investment Committee. Walter is a member of the Boston Chapter of the Society of Financial Service Professionals. Walter's specialty is retirement planning and income tax management strategies. He takes a goal-oriented approach to designing a financial plan based not only on listening and understanding his client's needs and financial goals but also educating his clients and making client service a priority in the financial planning process. Walter is a graduate of Colgate University with a B.A. in Economics. He is also a graduate of the New York University Stern School of Business where he received an MBA in Finance.

Business Experience:

Weston Financial Group, Inc., Wellesley, MA

Assistant Vice President 5/2016 to Present

Associate Counselor 1/2011 to Present

Senior Financial Associate 7/2005 to 1/2011

Financial Associate 6/2000 to 7/2005

*** CERTIFIED FINANCIAL PLANNER™**

The program is administered by the Certified Financial Planner Board of Standards, Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards.

Item 3 - Disciplinary Information

There are no legal or disciplinary items applicable to a client's or prospective client's evaluation of Mr. Riester. Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Item 4 - Other Business Activities

Mr. Riester is a Registered Representative of Weston Securities Corporation ("WSC"), a licensed broker-dealer and sister company to the Advisor and a wholly-owned subsidiary of Washington Trust Bancorp, Inc. In addition, Mr. Riester is an insurance agent with The Park Insurance Agency, Inc. ("Park"), a wholly-owned subsidiary of the Advisor.

WSC acts as an introducing broker-dealer for the placement of securities for certain mutual funds, variable annuities, 529 College Savings Plans, and limited partnerships, and as the principal underwriter and distributor for New Century Portfolios, a registered investment company. In addition, Park is an insurance agency that facilitates the placement of fixed annuities and life insurance policies. The Advisor

may recommend or manage client investments in such products and as such Mr. Riester may receive compensation based, in part, on investment advisor fees paid to the Advisor; and on commissions, trailers, and/or 12b-1 fee or service fees (“Trailers”); and insurance commissions for placing business through WSC or Park respectively. This compensation is independent of his fixed annual salary and Mr. Riester is also entitled to receive distributions from the Advisor’s net profits pursuant to a defined bonus program and is compensated based, in part, on the value of assets held in a Portfolio or private account he manages. In addition, he is compensated, on a percentage basis, for financial planning and tax return services. Further, Mr. Riester’s employer also receives payments for placing such investments through the Advisor, WSC or Park.

The Advisor has policies and procedures in place to ensure that the products recommended by Mr. Riester are based on the individual needs and objectives of the client rather than on any compensation that may be received.

Employees of the Advisor may invest in their own personal accounts. As such, the personnel may buy or sell securities also recommended to clients. To deal with any conflicts of interest, the Advisor has adopted a Code of Ethics and Statement for Insider Trading. The Code of Ethics contains provisions reasonably necessary to deter misconduct, conflicts of interest and to detect any trading violations. The Advisor has in place an Insider Trading Statement which bars trading on material non-public information. A summary of the Code of Ethics is located in the Advisor’s Brochure and the full Code of Ethics will be provided upon request.

Item 5 - Additional Compensation

Mr. Riester does not receive compensation from any outside entity other than as disclosed above in “Other Business Activities.”

Item 6 - Supervision

Mr. Riester’s investment advisory activities are supervised by **Maria A. Staffiere**, Managing Director and Senior Financial Counselor of the Advisor. Ms. Staffiere monitors the investment advice provided to clients by Mr. Riester through routine communications with Mr. Riester. In addition, Ms. Staffiere meets regularly with Mr. Riester to discuss business goals and objectives. Further, Ms. Staffiere may periodically participate in client meetings and may also sample various communications provided to clients.

If you should have any questions regarding the supervision or the activities performed by Mr. Riester; **Maria A. Staffiere**, Managing Director and Senior Financial Counselor, can be reached at mstaffiere@westonfinancial.net or at 781-235-7055 x 7837.

Every employee has a responsibility for knowing and following the Advisor’s policies and procedures. Every person in a supervisory role is also responsible for those individuals under his/her supervision. Supervision is evidenced by periodic meetings with the supervising principal and the supervised person as well as independent annual reviews by the Compliance Department. Nicole M. Tremblay, Esq.; Senior Vice President and Chief Compliance Officer (the “CCO”), has the overall responsibility for monitoring and testing compliance with the Firm’s policies and procedures. Possible violations of these policies or procedures will be documented and reported to the appropriate department manager for remedial action. Repeated violations, or violations that the CCO deems to be of serious nature, will be reported by the CCO directly to the President, or a similarly designated officer, and/or the Advisor’s Board of Directors and/or investment companies’ Board of Trustees.



WESTON FINANCIAL

Maria A. Staffiere, RLP®

Weston Financial Group, Inc.

100 William Street, Suite 200

Wellesley, MA 02481

781-235-7055

www.westonfinancial.net

February 27, 2017

This Brochure Supplement provides information about Maria A. Staffiere that supplements Weston Financial's Brochure. You should have received a copy of that Brochure. Please contact Nicole M. Tremblay at 781-235-7055 or ntremblay@westonfinancial.net if you did not receive Weston Financial's Brochure or if you have any questions about the contents of this Supplement.

Additional information about Maria A. Staffiere is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Maria A. Staffiere (Year of birth: 1960)

Professional Designation: RLP® *

Educational Background:

Mount Ida College, Newton, MA, A.S. Business

Suffolk University, Boston, MA, B.S. Business Administration

Maria has been with Weston Financial (the “Advisor”) since 1985 and has been a Senior Financial Counselor since 1991 and a Managing Director since 2009. She is a voting member of the Advisor’s Investment Committee. Maria specializes in aligning clients’ life goals with their financial goals while designing long-term strategic tax, asset allocation, and investment solutions. In addition, Maria works extensively with founders of pre-IPO companies to design tax efficient exit strategies that allow for the diversification and growth of their stock proceeds to meet their financial goals. She graduated from Suffolk University, Cum Laude, with a B.S. in Business Administration. Maria volunteers her time with Junior Achievement.

Business Experience:

Weston Financial Group, Inc., Wellesley, MA

Managing Director 5/2009 to Present

Senior Financial Counselor 1991 to Present

Vice President 8/2005 – 5/2009

The Park Insurance Agency, Inc.

Vice President 6/2010 to Present

*** REGISTERED LIFE PLANNER®**

This designation is administered by the Kinder Institute of Life Planning that denotes an adviser with advanced training in client relationship skills and holistic financial advice. This program focuses on financial life planning, a method which rests on the idea that advisers must first discover a client’s most essential goals in life before formulating a financial plan. RLPs® must complete a three step curriculum for initial certification followed by biannual CEU requirements to maintain certification. Planners must also adhere to Kinder Institute’s code of ethics standards.

Item 3 - Disciplinary Information

There are no legal or disciplinary items applicable to a client’s or prospective client’s evaluation of Ms. Staffiere. Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Item 4 - Other Business Activities

Ms. Staffiere is a Registered Representative of Weston Securities Corporation (“WSC”), a licensed broker-dealer and sister company to the Advisor and a wholly-owned subsidiary of Washington Trust Bancorp, Inc. In addition, Ms. Staffiere is a Vice President and an insurance agent with The Park Insurance Agency, Inc. (“Park”), a wholly-owned subsidiary of the Advisor.

WSC acts as an introducing broker-dealer for the placement of securities for certain mutual funds, life and variable annuities, 529 College Savings Plans, and limited partnerships, and as the principal underwriter

and distributor for New Century Portfolios, a registered investment company. In addition, Park is an insurance agency that facilitates the placement of fixed annuities and life insurance policies. The Advisor may recommend or manage client investments in such products and as such, Ms. Staffiere may receive compensation based, in part, on investment advisor fees paid to the Advisor and on commissions and/or service fees (“Trailers”) and insurance commissions for products and services offered by WSC and Park. This compensation is independent of her fixed annual salary and Ms. Staffiere is entitled to receive distributions from the Advisor’s net profits pursuant to a defined bonus program and is compensated based, in part, on the value of assets held in a Portfolio or private account that she manages. In addition, she is compensated, on a percentage basis, for financial planning and tax return services. Further, Ms. Staffiere’s employer also receives payments for placing such investments through the Advisor, WSC or Park.

The Advisor has policies and procedures in place to ensure that the products recommended by Ms. Staffiere are based on the individual needs and objectives of the client rather than on any compensation that may be received.

Employees of the Advisor may invest in their own personal accounts. As such, the personnel may buy or sell securities also recommended to clients. To deal with any conflicts of interest, the Advisor has adopted a Code of Ethics and Statement for Insider Trading. The Code of Ethics contains provisions reasonably necessary to deter misconduct, conflicts of interest and to detect any trading violations. The Advisor has in place an Insider Trading Statement which bars trading on material non-public information. A summary of the Code of Ethics is located in the Advisor’s Brochure and the full Code of Ethics will be provided upon request.

Item 5 - Additional Compensation

Ms. Staffiere does not receive compensation from any outside entity other than as disclosed above in “Other Business Activities.”

Item 6 - Supervision

Ms. Staffiere’s investment advisory activities are supervised by **John W. Filoon, III (“Jake”)**; President and Chief Operating Officer of the Advisor. Mr. Filoon monitors the investment advice provided to clients by Ms. Staffiere through routine communications with Ms. Staffiere. In addition, Mr. Filoon meets regularly with Ms. Staffiere to discuss business goals and objectives. Further, Mr. Filoon may periodically participate in client meetings and may also sample various communications provided to clients.

If you should have any questions regarding the supervision or the activities performed by Ms. Staffiere; **Jake Filoon**, President and Chief Operating Officer, can be reached at jwfiloon@westonfinancial.net or at 781-235-7055 x 7801.

Every employee has a responsibility for knowing and following the Advisor’s policies and procedures. Every person in a supervisory role is also responsible for those individuals under his/her supervision. Supervision is evidenced by periodic meetings with the supervising principal and the supervised person as well as independent annual reviews by the Compliance Department. Nicole M. Tremblay, Esq.; Senior Vice President and Chief Compliance Officer (the “CCO”), has the overall responsibility for monitoring and testing compliance with the Firm’s policies and procedures. Possible violations of these policies or procedures will be documented and reported to the appropriate department manager for remedial action. Repeated violations, or violations that the CCO deems to be of serious nature, will be reported by the CCO directly to the President, or a similarly designated officer, and/or the Advisor’s Board of Directors and/or investment companies’ Board of Trustees.



WESTON FINANCIAL

Ronald A. Sugameli

Weston Financial Group, Inc.

100 William Street, Suite 200

Wellesley, MA 02481

781-235-7055

www.westonfinancial.net

February 27, 2017

This Brochure Supplement provides information about Ronald A. Sugameli that supplements Weston Financial's Brochure. You should have received a copy of that Brochure. Please contact Nicole M. Tremblay at 781-235-7055 or ntremblay@westonfinancial.net if you did not receive Weston Financial's Brochure or if you have any questions about the contents of this Supplement.

Additional information about Ronald A. Sugameli is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience

Ronald A. Sugameli (Year of birth: 1952)

Educational Background:

Tufts University, Medford, MA, B.S. Psychology and Political Science
Georgetown University Law Center, Washington, DC, J.D.

Mr. Sugameli has been a Senior Financial Counselor with Weston Financial (the "Advisor") since 1984, a Managing Director since 2005, and he has served as the Advisor's Chief Investment Officer since 2009. He is a Senior Vice President of New Century Portfolios and has been the Portfolio Manager of the New Century Alternative Strategies Portfolio since its inception in 2002. Mr. Sugameli is the Co-Chairperson and a voting member of the Advisor's Investment Committee. Mr. Sugameli works with many of the Firm's high net worth clients and specializes in the creation of customized portfolios designed to achieve client objectives with managed volatility. Mr. Sugameli is a member of the Massachusetts Bar and the New York Bar. Mr. Sugameli graduated from Tufts University, Magna Cum Laude, with a B.S. and a double major in Psychology and Political Science; and Georgetown University Law Center from which he received a Juris Doctorate degree.

Business Experience:

Weston Financial Group, Inc., Wellesley, MA
Chief Investment Officer 5/2009 to Present
Managing Director 8/2005 to Present
Vice President and Senior Financial Counselor 1984 to Present

Item 3 - Disciplinary Information

There are no legal or disciplinary items applicable to a client's or prospective client's evaluation of Mr. Sugameli. Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

Item 4 - Other Business Activities

Mr. Sugameli is a General Securities Principal of Weston Securities Corporation ("WSC"), a licensed broker-dealer and sister company to the Advisor and a wholly-owned subsidiary of Washington Trust Bancorp, Inc. In addition, Mr. Sugameli is an insurance agent with The Park Insurance Agency, Inc. ("Park"), a wholly-owned subsidiary of the Advisor.

WSC acts as an introducing broker-dealer for the placement of securities for certain mutual funds, life and variable annuities, 529 College Savings Plans and limited partnerships, and as the principal underwriter and distributor for New Century Portfolios, a registered investment company. In addition, Park is an insurance agency that facilitates the placement of fixed annuities and life insurance policies. The Advisor may recommend or manage client investments in such products and as such, Mr. Sugameli's compensation is based, in part, on participation in a bonus program based on the Advisor's net profits. In addition, Mr. Sugameli may be entitled to commissions, trailers and/or 12b-1 fees or service fees ("Trailers") and insurance commissions for products and services offered by WSC and Park respectively.

The Advisor has policies and procedures in place to ensure that the products recommended by Mr. Sugameli are based on the individual needs and objectives of the client rather than on any compensation that may be received.

Employees of the Advisor may invest in their own personal accounts. As such, the personnel may buy or sell securities also recommended to clients. To deal with any conflicts of interest, the Advisor has adopted a Code of Ethics and Statement for Insider Trading. The Code of Ethics contains provisions reasonably necessary to deter misconduct, conflicts of interest and to detect any trading violations. The Advisor has in place an Insider Trading Statement which bars trading on material non-public information. A summary of the Code of Ethics is located in the Advisor's Brochure and the full Code of Ethics will be provided upon request.

Item 5 - Additional Compensation

Mr. Sugameli does not receive compensation from any outside entity other than as disclosed above in "Other Business Activities."

Item 6 - Supervision

Mr. Sugameli is supervised by **John W. Filoon, III ("Jake")**; President and Chief Operating Officer of the Advisor. Mr. Filoon monitors the investment advice provided to clients by Mr. Sugameli through routine communications with Mr. Sugameli. In addition, Mr. Filoon meets regularly with Mr. Sugameli to discuss business goals and objectives. Further, Mr. Filoon may periodically participate in client meetings and may also sample various communications provided to clients.

If you should have any questions regarding the supervision or the activities performed by Mr. Sugameli; **Jake Filoon**, President and Chief Operating Officer, can be reached at jwfiloon@westonfinancial.net or at 781-235-7055 x 7801.

Every employee has a responsibility for knowing and following the Advisor's policies and procedures. Every person in a supervisory role is also responsible for those individuals under his/her supervision. Supervision is evidenced by periodic meetings with the supervising principal and the supervised person as well as independent annual reviews by the Compliance Department. Nicole M. Tremblay, Esq.; Senior Vice President and Chief Compliance Officer (the "CCO"), has the overall responsibility for monitoring and testing compliance with the Firm's policies and procedures. Possible violations of these policies or procedures will be documented and reported to the appropriate department manager for remedial action. Repeated violations, or violations that the CCO deems to be of serious nature, will be reported by the CCO directly to the President, or a similarly designated officer, and/or the Advisor's Board of Directors and/or investment companies' Board of Trustees.