

Part 2B of Form ADV
Firm Brochure Supplement for Stuart E. Lucas
Wealth Strategist Partners, LLC
May, 2011

Wealth Strategist Partners, LLC
180 North Stetson, Suite 1310
Chicago, IL 60601
312-863-6080
www.wealthstrategistpartners.com

This brochure supplement provides information about Stuart E. Lucas that supplements the Wealth Strategist Partners, LLC brochure. You should have received a copy of that brochure. Please contact Susan Lucas, President of Wealth Strategist Partners, LLC if you did not receive Wealth Strategist Partners, LLC's brochure or if you have any questions about the contents of this supplement.

May, 2011

Part 2B: Brochure Supplement for Stuart E Lucas

Item 2 Educational Background and Business Experience

Stuart has worked as an investment professional for 30 years. As a principal of Wealth Strategist Partners, LLC (WSP), Stuart provides investment management leadership and advice to a small number of wealthy individuals and families, including his own family. For many years, Stuart (a fourth-generation descendent of E.A. Stuart, founder of the Carnation Company) co-managed his family's investment office with his sister-in-law, Melissa Lucas, and his brother, William. WSP is now the investment adviser to the Lucas family investment entities. From 2000 to 2002, Stuart was the Senior Managing Director of the Ultra-High Net Worth Group within Private Client Services at Bank One (now JP Morgan Chase). Earlier in his career, he served as general manager of Wellington Management Company's European operations and as the Assistant Portfolio Manager of a Forbes Honor Roll mutual fund.

In addition, Stuart teaches wealthy individuals and families about wealth management. He designed and teaches the Private Wealth Management executive education program in Chicago and Madrid for the University of Chicago Booth School of Business. His book, *Wealth: Grow It, Protect It, Spend It and Share It*, has been published on three continents. He is a featured speaker around the world and author of numerous articles on wealth management.

Stuart serves on the boards of National Public Radio Foundation and the Stuart Foundation. He serves on the investment committees of NPR, Inc. and the Stuart Foundation.

He has a bachelor's degree with high honors from Dartmouth College, an MBA from Harvard Business School, and is a Chartered Financial Analyst (CFA).

Chartered Financial Analyst

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute—the largest global association of investment professionals. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct. To learn more about the CFA charter, visit www.cfainstitute.org.

Item 3 Disciplinary Action

Stuart E Lucas has not been the subject of any material legal or disciplinary event and therefore, neither Stuart E Lucas nor WSP has any information applicable to this item.

Item 4 Other Business Activities

Other Investment-related business

May, 2011

Other than the activities described above, Stuart Lucas is not involved in any other investment-related business or occupation.

Other business or occupation

Stuart is the author of the book *Wealth: Grow It, Protect It, Spend It, and Share It* (2006, Wharton School Press).

Item 5 Additional Compensation

No person who is not a client provides an economic benefit to Stuart Lucas for providing advisory services.

Item 6 Supervision

Stuart Lucas is an owner of WSP and its senior investment professional. In this small firm, in which all principals are related, all the professionals oversee each other. Regular discussion of material client issues and a collegial culture create checks and balances among all professionals. WSP investment professionals work closely with their clients' third party, independent professionals on investment and financial planning matters which also serves as an additional check on WSP's activities. WSP investment professionals may be reached at (312) 863-6080.

Item 7 Requirements for State-Registered Advisers N/A

Wealth Strategist Partners, LLC

Form ADV Part 2B

May, 2011

Part 2B of Form ADV
Firm Brochure Supplement for Melissa Friedman
Lucas
Wealth Strategist Partners, LLC
May, 2011

Wealth Strategist Partners, LLC
180 North Stetson, Suite 1310
Chicago, IL 60601
312-863-6080
www.wealthstrategistpartners.com

This brochure supplement provides information about Melissa Friedman Lucas that supplements the Wealth Strategist Partners, LLC brochure. You should have received a copy of that brochure. Please contact Susan Lucas, President of Wealth Strategist Partners, LLC if you did not receive Wealth Strategist Partners, LLC's brochure or if you have any questions about the contents of this supplement.

May, 2011

Part 2B: Brochure Supplement for Melissa Friedman Lucas

Item 2 Educational Background and Business Experience

Melissa has worked as an investment professional for nearly 30 years. For more than a decade, Melissa was a principal in the Lucas family office. She continues to provide investment leadership and advice to the Lucas investment entities, in concert with Stuart¹. She also acts as CIO for another extended family, leading the process of managing their liquid wealth following the sale of their family business.

Prior to her work for wealthy families, Melissa was with The Capital Group Companies for nearly a decade. Melissa joined Capital as part of the Associates program from which she graduated to become a chemical analyst and investor within Capital Guardian Trust Company. Subsequently she moved to Capital Research Company, where she researched the chemical and health care industries and managed nearly \$500 million of investments, influencing investment in these areas throughout the American Funds family of mutual funds. She came to The Capital Group Companies from Merck & Co, where she was a biochemist.

Melissa graduated summa cum laude with a degree in biochemical sciences from Princeton University, where she was elected to Phi Beta Kappa.

Item 3 Disciplinary Action

Melissa Friedman Lucas has not been the subject of any material legal or disciplinary event and therefore, neither Wealth Strategist Partners, LLC (WSP) nor Melissa Friedman Lucas has any information applicable to this item.

Item 4 Other Business Activities

Other investment-related business

Melissa Friedman Lucas is not involved in any other investment-related business or occupation.

Other business of occupation

Melissa Friedman Lucas is an independent contractor working with WSP.

Item 5 Additional Compensation

No person who is not a client provides an economic benefit to Melissa Friedman Lucas for providing advisory services.

Item 6 Supervision

¹ Melissa is married to Stuart's brother, William.

May, 2011

In this small firm, in which all principals are related, all the professionals oversee each other. Regular discussion of material client issues and a collegial culture create checks and balances among all professionals. WSP investment professionals work closely with their clients' third party, independent professionals on investment and financial planning matters which also serves as an additional check on WSP's activities. WSP investment professionals may be reached at (312) 863-6080.

Item 7 Requirements for State-Registered Advisers N/A