

## Item 1: Cover Page

XY Investment Solutions, LLC  
(Doing business as Beechmont Financial)



## Form ADV Part 2B Brochure Supplement for **Melody Brady**

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(Mailing Address)

Phone: (614) 547-3707

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This brochure supplement provides information about Melody Brady that supplements the XY Investment Solutions, LLC brochure. You should have received a copy of that brochure. Please contact XY Investment Solutions, LLC if you did not receive XY Investment Solutions, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Melody Brady is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 5917151.

## Item 2: Educational Background & Business Experience

### Name:

Melody Brady

### Year of Birth:

1987

### Education:

- 2011 - Masters of Business Administration with focus in Finance, South University
- 2009 - Bachelors of Science with focus in Finance, California State University - Northridge

### Business Background:

- 02/2024 - Present - XY Investment Solutions, Financial Advisor
- 12/2023 - 02/2024 - Beechmont Financial Group LLC, Founder and CCO
- 08/2014 - 12/2023 - CUSO Financial Services, Financial Advisor
- 04/2011 - 08/2014 - Charles Schwab & Co., Inc., 401(K) Advice Specialist

### Professional Designations:

- CFP (Certified Financial Planner)®  
*CFP® certificants must have a minimum of three years' workplace experience in financial planning and develop their theoretical and practical financial planning knowledge by completing a comprehensive course of study approved by CFP Board. They must pass a comprehensive 2-day, 10-hour CFP® Certification Examination that tests their ability to apply financial planning knowledge in an integrated format. As a final step to certification, CFP® practitioners agree to abide by a strict code of professional conduct.*
- Chartered Financial Consultant (ChFC)  
*This designation is issued by The American College and is granted to individuals who have at least three years of full-time business experience within the five years preceding the awarding of the designation. The candidate is required to take seven mandatory courses which include the following disciplines: financial, insurance, retirement and estate planning; income taxation, investments and application of financial planning; as well as two elective courses involving the application of the aforementioned disciplines. Each course has a final proctored exam and once issued, the individual is required to submit 30 hours of continuing education every two years.*

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Melody Brady.

### **Item 4: Other Business Activities**

Melody Brady is not involved in any outside business activities.

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

Melody Brady does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits for his clients at XY Investment Solutions, LLC are conveyed through XY Investment Solutions, LLC.

### **Item 6: Supervision**

Melody Brady is supervised and monitored by Jeff Snodgrass, Chief Compliance Officer, pursuant to XY Investment Solutions, LLC's written policies and procedures and code of ethics. Jeff Snodgrass may be reached at (360) 301-7579.