Item 1: Cover Page



SEC File No. 801-36104

# **Brochure Supplement**

February 21, 2023

Olivia A. Stacey, CFA®, CFP® Investment Advisor CRD No. 7226736

303 Detroit Street, Suite 203 Ann Arbor, Michigan 48104 734-761-6500

This brochure supplement provides information about Olivia A. Stacey that supplements the Exchange Capital Management, Inc. brochure. You should have received a copy of that brochure. If you did not receive a brochure or if you have any questions about the contents of this supplement, please contact us at 734-761-6500.

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

## Item 2: Educational Background and Business Experience

Olivia A. Stacey (b. 1990) is a Investment Advisor with Exchange Capital Management, Inc.

### A. Educational Background

Michigan State University, Bachelors of Science–Mathematics	2014

### **B. Business Background**

Exchange Capital Management, Inc.	07/2015–Present
Quantum Compliance Systems	12/2014–06/2015

## **C.** Professional Designations

### **Chartered Financial Analyst**<sup>®</sup> (CFA<sup>®</sup>)

The CFA® designation is an international professional certificate that is offered by the CFA Institute. Candidates that pursue the certification have in-depth knowledge of securities types and investment vehicles. In order to qualify for a CFA®, candidates must meet standards for examination, education, experience, and ethics. First, candidates must possess a bachelor's degree from an accredited school, or its equivalent. Second, candidates must have completed 48 months of qualified professional work experience, generally related to evaluating or applying financial, economic, and/or statistical data as part of the investment decision-making process involving securities or similar investment. Third, candidates must pass a series of three six-hour exams that covers ethics, quantitative methods, economics, corporate finance, financial reporting and analysis, security analysis, and portfolio management. Finally, candidates must meet and continue to adhere to a strict Code of Ethics and Stands governing their professional conduct, as reviewed by the CFA Institute.

#### **CERTIFIED FINANCIAL PLANNER™ (CFP<sup>®</sup>) Professional**

Individuals certified by CFP® Board have taken the step to demonstrate their professionalism by voluntarily submitting to the CFP® certification process that includes thorough education, examination, experience and ethical requirements. The CFP® is issued by the Certified Financial Planner Board of Standards, Inc. Prerequisites require a designee to hold a Bachelor's degree (or higher) from an accredited college or university as well as three years of full-time personal financial planning experience. In addition, candidates must complete a CFP-board registered program (or hold an accepted designation, degree or license) and take the CFP Certification examination. To maintain certification, the designee is required to complete 30 hours of continuing education every two years and continue to agree to be bound by the Standards of Professional Conduct.

# Item 3: Disciplinary Information

Olivia Stacey does not have any disciplinary action to report. Public information concerning her registration as an investment advisor representative may be found by accessing the SEC's public disclosure site at www.adviserinfo.sec.gov.

# Item 4: Other Business Activities

Olivia Stacey is a board member and director of CFA Society Detroit, a professional society.

## Item 5: Additional Compensation

Olivia Stacey receives no additional compensation through her business activity described in Item 4 above.

### Item 6: Supervision

Supervision of Olivia Stacey is performed by Michael Reid, Managing Director and Chief Compliance Officer, through reviews of internal transaction and security holdings reports, electronic and physical correspondence, and other internal reports as mandated by the firm and its regulatory authorities. Michael Reid can be reached at 734-761-6500.