



AMERICAN WEALTH MANAGEMENT

3480 Preston Ridge Road
Suite 500

Alpharetta, Georgia 30005
770-392-8741

gavinborzello@awmnc.biz

Form ADV Part IIB – Brochure Supplement February 13, 2026

Gavin M. Borzello President and Chief Compliance Officer (CRD # 3242246)

3480 Preston Ridge Road, Suite 500, Alpharetta, Georgia 30005
(770)392-8741
gavinborzello@awmnc.biz

Educational Background and Business Experience

Graduated from Georgia State University in Atlanta, Georgia with a Bachelor of Science degree in Decision Science (Business) 1999. I have been in the financial services industry since 1999 as broker, investment advisor representative, and compliance principal here at American Wealth Management, Inc. Passed Series 7, 63, 65, 53 and 24 licenses and tested and prepared for Level 1 and 2 CFA – Chartered Financial Analyst Exams.

Disciplinary Information

None

Other Business Activities

Insurance Licensed

Additional Compensation

W-2 Employee running AWM, Inc. as owner, President, and CCO

Supervision

Gavin M. Borzello is the President & Chief Compliance Officer. Supervision is conducted through ongoing compliance reviews, monitoring of accounts, and periodic meetings.

Supervisor Contact: 770-392-8741, gavinborzello@awmnc.biz

Requirements for State-Registered Advisers

Not applicable. American Wealth Management, Inc. is SEC-registered.



AMERICAN WEALTH MANAGEMENT

Form ADV Part 2B – Brochure Supplement Cont.

Richard Miller (CRD # 1381342)

3480 Preston Ridge Road, Suite 500, Alpharetta, Georgia 30005

(770)392-8751

RichardMiller@awminc.biz

Educational Background and Business Experience

Bachelor of Science in Science Administration Bowling Green State University, Bowling Green, Ohio

December 22, 1984

Rick Miller has worked at American Wealth Management, Inc. since 1993 and currently works as an Investment Advisor Representative serving individuals and families.

Disciplinary Information

None

Other Business Activities

None

Additional Compensation

None

Supervision

Supervised by Gavin M. Borzello, President & Chief Compliance Officer. Supervision is conducted through ongoing compliance reviews, monitoring of accounts, and periodic meetings.

Supervisor Contact: 770-392-8741, gavinborzello@awminc.biz

Requirements for State-Registered Advisers

Not applicable. American Wealth Management, Inc. is SEC-registered.



AMERICAN WEALTH MANAGEMENT

Form ADV Part 2B – Brochure Supplement Cont.

John Lutz (CRD # 4163091)

American Wealth Management, Inc.
118 E 9th Street, Casper WY 82601

(307)234-2169
johnlutz@awminc.biz

Educational Background and Business Experience

John Graduated with a Bachelor of Arts Degree in Political Economics (a Minor Degree in Business Administration) from Hillsdale College in Hillsdale, Michigan. John has served as a financial advisor for over 25 years (since February 2000). John and his team manage just under \$100,000,000.00 AUM, serving over 250 Individuals and families.

Disciplinary Information

None

Other Business Activities

None

Additional Compensation

None

Supervision

Supervised by Gavin M. Borzello, President & Chief Compliance Officer. Supervision is conducted through ongoing compliance reviews, monitoring of accounts, and periodic meetings.

Supervisor Contact: 770-392-8741, gavinborzello@awminc.biz

Requirements for State-Registered Advisers

Not applicable. American Wealth Management, Inc. is SEC-registered.



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Form ADV Part 2B – Brochure Supplement Cont.

Kurt Grimmer (CRD # 5751385)

3480 Preston Ridge Road, Suite 500, Alpharetta, Georgia 30005

(253)328-7727

kurtgrimmer@awminc.biz

Educational Background and Business Experience

Bachelor of Science in Business Administration, Certified Public Accountant – Inactive License. 10 years of experience as a financial advisor. I am currently an Investment Advisor Representative for the past 2 years. Series 7 and 65, with 25 years of experience in Commercial Banking.

Disciplinary Information

None

Other Business Activities

None

Additional Compensation

None

Supervision

Supervised by Gavin M. Borzello, President & Chief Compliance Officer. Supervision is conducted through ongoing compliance reviews, monitoring of accounts, and periodic meetings.

Supervisor Contact: 770-392-8741, gavinborzello@awminc.biz

Requirements for State-Registered Advisers

Not applicable. American Wealth Management, Inc. is SEC-registered.



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Form ADV Part 2B – Brochure Supplement Cont.

Lee Hollingsworth (CRD # 4445535)

American Wealth Management, Inc.
3480 Preston Ridge Road, Suite 500, Alpharetta, Georgia 30005
(678)576-4838
leehollingsworth@awmnc.biz

Educational Background and Business Experience

Bachelor's degree Florida State University 1976

Master's Degree University of Pennsylvania 1980

Chartered Financial Analyst 1984 – CFA

Investment Advisor Representative with American Wealth Management, Inc. from 2005 to present.

Disciplinary Information

None

Other Business Activities

None

Additional Compensation

None

Supervision

Supervised by Gavin M. Borzello, President & Chief Compliance Officer. Supervision is conducted through ongoing compliance reviews, monitoring of accounts, and periodic meetings.

Supervisor Contact: 770-392-8741, gavinborzello@awmnc.biz

Requirements for State-Registered Advisers

Not applicable. American Wealth Management, Inc. is SEC-registered.



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Form ADV Part 2B – Brochure Supplement Cont.

Kevin Hauser (CRD # 1407288)

3480 Preston Ridge Road, Suite 500, Alpharetta, Georgia 30005
(678)641-1223
kevinhauser@awminc.biz

Educational Background and Business Experience

Bachelor of Business Degree 1972 Series 7 broker since 1987, IAR representative since 1997.

Disciplinary Information

1989 Monetary Fine, censure

Other Business Activities

None

Additional Compensation

None

Supervision

Supervised by Gavin M. Borzello, President & Chief Compliance Officer. Supervision is conducted through ongoing compliance reviews, monitoring of accounts, and periodic meetings.

Supervisor Contact: 770-392-8741, gavinborzello@awminc.biz

Requirements for State-Registered Advisers

Not applicable. American Wealth Management, Inc. is SEC-registered.



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Form ADV Part 2B – Brochure Supplement Cont.

Steve Rowley (CRD # 867485)

American Wealth Management, Inc.
3480 Preston Ridge Road, Suite 500, Alpharetta, Georgia 30338
(770)845-6656
steverowley@awminc.biz

Educational Background and Business Experience

B.B.A. from Oglethorpe University, Brookhaven, GA. Employed at American Wealth Management, Inc. since 2009, Series 7 license and Investment Advisor Representative since 1979.

Disciplinary Information

None

Other Business Activities

None

Additional Compensation

None

Supervision

Supervised by Gavin M. Borzello, President & Chief Compliance Officer. Supervision is conducted through ongoing compliance reviews, monitoring of accounts, and periodic meetings.

Supervisor Contact: 770-392-8741, gavinborzello@awminc.biz

Requirements for State-Registered Advisers

Not applicable. American Wealth Management, Inc. is SEC-registered.



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Form ADV Part 2B – Brochure Supplement Cont.

Alex Lutz (CRD # 6667189)

American Wealth Management, Inc.
118 E 9th Street, Casper WY 82601

(307)234-2169
alexlutz@awminc.biz

Educational Background and Business Experience

He graduated from the University of Wyoming in 2016 with a degree in Economics and a minor in finance. Has worked with American Wealth Management, Inc. for the past 3 years for the Lutz team.

Disciplinary Information

None

Other Business Activities

None

Additional Compensation

None

Supervision

Supervised by Gavin M. Borzello, President & Chief Compliance Officer. Supervision is conducted through ongoing compliance reviews, monitoring of accounts, and periodic meetings.

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Requirements for State-Registered Advisers

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