

**Part 2B of Form ADV: *Brochure Supplement***

**DBA:**



**Eric Schrum, CFP®**

4325 Lake Boone Trail #225, Raleigh, NC 27607  
Phone | 888.963.0363

March 2025

This brochure supplement provides information about Eric Schrum that supplements the Schrum Private Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Schrum Private Wealth Compliance at 888.963.0363 if you did not receive Schrum Private Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Eric Schrum is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

**Full Legal Name:** Eric Schrum

**Born:** 1992

**Education:** Florida State University, 2015.  
Certified Financial Planner, CFP®, 2021 (Minimum Qualifications: Bachelor's Degree or higher, Three years of full-time personal financial planning experience, CFP Board Registered education program, final certification exam).

### Business Experience

Schrum Private Wealth Management LLC; President, January 2025 to Present

Schrum Private Wealth Management LLC; Financial Advisor, August 2021 to Present

Spire Wealth Management; Financial Advisor, March 2017 to August 2021

Fidelity Brokerage Services LLC; Financial Representative, February 2016 to January 2017

## Item 3 Disciplinary Information

Eric Schrum has no reportable disciplinary history.

## Item 4 Other Business Activities

### A. Investment-Related Activities

Eric Schrum is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

### B. Non-Investment-Related Activities

Eric Schrum is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

## Item 5 Additional Compensation

Eric Schrum does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## Item 6 Supervision

**Supervisor:** Sal A. Malik

**Title:** Chief Supervision Officer

**Phone Number:** 703-657-6075

In addition to an annual review of our Firm's policies and procedures, each advisor is supervised with the following ongoing review:

- a. Daily trade reviews
- b. Monthly review of personal securities accounts
- c. Monthly review of business bank statements of DBAs
- d. Monthly correspondence reviews - including ongoing capture and review of email
- e. Periodic reviews of client account activity.