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Dated February 22, 2024

Form ADV Part 2B – Brochure Supplement

For

Daniel Da Ponte

Managing Principal, Senior Financial Advisor and Chief Compliance Officer

This brochure supplement provides information about Daniel Da Ponte that supplements the Axis Wealth Partners, LLC (“Axis”) brochure. A copy of that brochure precedes this supplement. Please contact Daniel Da Ponte if the Axis brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Daniel Da Ponte is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 4351051.

Item 2: Educational Background and Business Experience

Daniel Da Ponte

Born: 1978

Educational Background

- 2000 – Bachelor of Science, Business Administration, University of Rhode Island
- 2009 – Graduate Certificate in Personal Financial Planning, Kansas State University
- 2014 – Master’s Degree in Personal Financial Planning, Kansas State University

Business Experience

- 03/2013 – Present, Axis Wealth Partners, LLC, Managing Principal, Senior Financial Advisor and Chief Compliance Officer
- 03/2013 – Present, Axis Risk Management, LLC, Managing Member
- 01/1999 – 01/2019, State of Rhode Island, State Senator
- 10/2005 – 03/2013, Axis Financial Group Inc., Registered Representative
- 05/2005 – 03/2013, Commonwealth Financial Network, Registered Representative

Professional Designations, Licensing & Exams

Accredited Investment Fiduciary® (AIF®): The AIF Designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF Designation, the individual must meet prerequisite criteria based on a combination of education, relevant industry experience, and/or ongoing professional development, complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the Code of Ethics and Conduct Standards. In order to maintain the AIF® Designation, the individual must annually attest to the Code of Ethics and Conduct Standards and accrue and report a minimum of six hours of continuing education. The Designation is administered by the Center for Fiduciary Studies, the standards-setting body of fi360.

Item 3: Disciplinary Information

Daniel Da Ponte does not have a disciplinary history to report.

Item 4: Other Business Activities

Daniel Da Ponte is licensed to sell life and health insurance through Axis Risk Management, LLC. He may engage in product sales with our clients, for which he will receive additional compensation. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under Axis. While Daniel Da Ponte endeavors at all times to put the interest of our clients first as part of our firm's fiduciary duty, you should be aware that the receipt of additional compensation itself creates a conflict of

interest and may affect their judgment when making recommendations. This activity accounts for about 2 hours a week, sometimes during trading hours.

Mr. Da Ponte is the owner of MDD Realty, LLC and ASD Partners, LLC, each a real estate investment company.

As well as his business endeavors, Mr. Da Ponte holds several voluntary positions within the community.

- Board of Directors for Neighborhood Health Plan of Rhode Island.
- Board Member of the Greater Providence YMCA.

Item 5: Additional Compensation

Daniel Da Ponte does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Axis.

Item 6: Supervision

Daniel Da Ponte, as Managing Principal, Senior Financial Advisor and Chief Compliance Officer of Axis, is responsible for supervision and supervises personnel and the investments made in client accounts. Mr. Da Ponte monitors the investments to ensure they are suitable for the client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. He may be contacted at the phone number on this brochure supplement.

AXIS WEALTH partners

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March 2, 2023

Form ADV Part 2B – Brochure Supplement

For

Michael G. Leonardo

Investment Advisor Representative

This brochure supplement provides information about Michael Leonardo that supplements the Axis Wealth Partners, LLC (“Axis”) brochure. A copy of that brochure precedes this supplement. Please contact Michael Leonardo if the Axis brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Michael Leonardo is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 3236871.

Item 2: Educational Background and Business Experience

Michael G. Leonardo

Born: 1957

Educational Background

- 1979 – Bachelor of Arts, in Finance, University of Massachusetts

Business Experience

- 11/2020 – Present, Axis Wealth Partners, LLC, Investment Advisor Representative
- 11/2020 - Present, Axis Risk Management, LLC, Insurance Agent
- 09/2005 – 11/2020, Amerprise Financial Services, Inc., Registered Representative and Financial Advisor
- 05/1999 – 07/2006, IDS Life Insurance Company, Registered Representative

Item 3: Disciplinary Information

No management person at Axis Wealth Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Michael Leonardo is licensed to sell life and health insurance through Axis Risk Management, LLC. He may engage in product sales with our clients, for which he will receive additional compensation. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under Axis. While Michael Leonardo endeavors at all times to put the interest of our clients first as part of our firm's fiduciary duty, you should be aware that the receipt of additional compensation itself creates a conflict of interest and may affect their judgment when making recommendations. This activity accounts for about 2 hours a week, sometimes during trading hours.

Item 5: Additional Compensation

Michael Leonardo does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Axis.

Item 6: Supervision

Daniel Da Ponte, as President and Chief Compliance Officer of Axis, is responsible for supervision. He may be contacted at the phone number on this brochure supplement.

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March 2, 2023

Form ADV Part 2B – Brochure Supplement

For

Jane E. McAuliffe

Partner and Investment Advisor Representative

This brochure supplement provides information about Jane McAuliffe that supplements the Axis Wealth Partners, LLC (“Axis”) brochure. A copy of that brochure precedes this supplement. Please contact Jane McAuliffe if the Axis brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Jane McAuliffe is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 3031341.

Item 2: Educational Background and Business Experience

Jane Elizabeth McAuliffe

Born: 1973

Educational Background

- 1995 – Bachelor of Science, Management, Bryant University

Business Experience

- 06/2017 – Present, Axis Wealth Partners, LLC, Partner and Investment Advisor Representative
- 07/2017 – Present, Collaborative Divorce Strategies, President,
- 07/2015 – 06/2017, Forbes Financial Planning, Inc., Financial Advisor
- 07/2013 – 06/2015, The Shuster Group, Key Account Sales

Professional Designations

Certified Divorce Financial Analyst® CDFA® certificate holders are governed by the Institute for Divorce Financial Analysts (IDFA™) which is dedicated to the certification, education, and promotion of the use of financial professionals in the divorce arena. The IDFA provides comprehensive training using a variety of knowledge and skill-building techniques. Candidates learn how to help their clients with determinative financial issues related to divorce and receive the CDFA® designation after successfully completing the course and qualifying examinations. Upon course completion, candidates must pass three 2-hour multiple choice examinations and a fourth comprehensive case study examination demonstrating proficiency with the Institute's proprietary software. To retain the CDFA designation, you must also obtain 15 divorce-related hours of continuing education every two years.

Item 3: Disciplinary Information

No management person at Axis Wealth Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Jane McAuliffe is also the President of Collaborative Divorce Strategies, a firm offering financial coaching and analysis during divorces. This activity accounts for approximately 40% of her time.

Item 5: Additional Compensation

Jane McAuliffe does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Axis.

Item 6: Supervision

Daniel Da Ponte, as President and Chief Compliance Officer of Axis, is responsible for supervision. He may be contacted at the phone number on this brochure supplement.

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March 2, 2023

Form ADV Part 2B – Brochure Supplement

For

Sean P. Durkin, CRPC®

Partner and Senior Financial Advisor

This brochure supplement provides information about Sean Durkin that supplements the Axis Wealth Partners, LLC (“Axis”) brochure. A copy of that brochure precedes this supplement. Please contact Sean Durkin if the Axis brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Sean Durkin is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 4284662.

Item 2: Educational Background and Business Experience

Sean P. Durkin, CRPC®

Born: 1966

Educational Background

- 1998 – Master of Business Administration, Bentley University
- 1990 – Bachelor of Science in Business Administration, University of Massachusetts – Lowell

Business Experience

- 01/2023 – Present, Axis Wealth Partners, LLC, Partner and Senior Financial Advisor
- 01/2023 – Present, Axis Risk Management, LLC,
- 09/2005 – 01/2023, Ameriprise Financial Services, Inc., Registered Representative
- 01/2000 – 07/2006, IDS Life Insurance Company, Registered Representative
- 10/2000 – 09/2005, American Express Financial Advisors Inc., Registered Representative

Professional Designations

Chartered Retirement Planning Counselor™ (CRPC®): Individuals who hold the CRPC® designation have completed a course of study encompassing pre-and post-retirement needs, asset management, estate planning and the entire retirement planning process using models and techniques from real client situations. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

Item 3: Disciplinary Information

No management person at Axis Wealth Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Sean Durkin is licensed to sell life and health insurance through Axis Risk Management, LLC. He may engage in product sales with our clients, for which he will receive additional compensation. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under Axis. While Sean Durkin endeavors at all times to put the interest of our clients first as part of our firm's fiduciary duty, you should be aware that the receipt of additional compensation itself creates a conflict of interest and may affect their judgment when making recommendations. This activity accounts for about 2 hours a week, sometimes during trading hours.

Item 5: Additional Compensation

Sean Durkin does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Axis.

Item 6: Supervision

Daniel Da Ponte, as President and Chief Compliance Officer of Axis, is responsible for supervision. He may be contacted at the phone number on this brochure supplement.

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March 2, 2023

Form ADV Part 2B – Brochure Supplement

For

Joshua S. Pacheco

Investment Advisor Representative

This brochure supplement provides information about Joshua Pacheco that supplements the Axis Wealth Partners, LLC (“Axis”) brochure. A copy of that brochure precedes this supplement. Please contact Joshua Pacheco if the Axis brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Joshua Pacheco is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 5865407.

Item 2: Educational Background and Business Experience

Joshua Sousa Pacheco

Born: 1985

Educational Background

- 2009 – Bachelor of Science, Finance, University of Massachusetts
- 2014 – Masters Liberal Arts, Management, Harvard University

Business Experience

- 09/2014 – Present, Axis Wealth Partners, LLC, Investment Advisor Representative
- 11/2014 – Present, Innovation Partners, LLC, Registered Representative
- 11/2013 – 05/2017, Safely Date, Inc., President

Item 3: Disciplinary Information

No management person at Axis Wealth Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Joshua Pacheco is licensed as registered representatives of Innovation Partners, LLC, a FINRA Broker/Dealer. He also is an independent insurance agent. As such, Joshua Pacheco, in his separate capacity as either a registered representative and/or insurance agent, will be able to effect securities transactions and/or purchase insurance and insurance-related investment products (insurance) for your account, for which he will receive separate and customary compensation. While Joshua Pacheco endeavors at all times to put the interest of our clients first as part of our firm's fiduciary duty, you should be aware that the receipt of additional compensation itself creates a conflict of interest and may affect their judgment when making recommendations.

Mr. Pacheco is a manages and is a partner in the ownership of multi-family homes. Mr. Pacheco is the sole owner of an apartment complex. Mr. Pacheco is the sole owner of a furniture store.

Item 5: Additional Compensation

Joshua Pacheco does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Axis.

Item 6: Supervision

Daniel Da Ponte, as President and Chief Compliance Officer of Axis, is responsible for supervision. He may be contacted at the phone number on this brochure supplement.

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March 2, 2023

Form ADV Part 2B – Brochure Supplement

For

Emanuel J. Pinheiro

Investment Advisor Representative

This brochure supplement provides information about Emanuel Pinheiro that supplements the Axis Wealth Partners, LLC (“Axis”) brochure. A copy of that brochure precedes this supplement. Please contact Emanuel Pinheiro if the Axis brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Emanuel Pinheiro is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 5623110.

Item 2: Educational Background and Business Experience

Emanuel James Pinheiro

Born: 1986

Educational Background

- 2008 – Bachelor of Business Administration, University of Rhode Island
- 2008 – Bachelor of Arts, Economics, University of Rhode Island

Business Experience

- 02/2021 – Present, Axis Wealth Partners, LLC, Investment Advisor Representative
- 06/2016 – 02/2021, Horizon Benefits, LLC, Principal
- 05/2013 – 05/2016, Insurance Agent, Self Employed
- 12/2013 – 12/2015, MML Investors Services, LLC, Registered Representative
- 10/2013 – 12/2015, MassMutual Life Insurance Company, Agent
- 07/2012 – 05/2013, Fidelity Investments, Internal Wholesaler
- 01/2009 – 07/2012, NY Life Securities LLC, Registered Representative
- 12/2008 – 07/2012, New York Life Insurance Company, Agent

Item 3: Disciplinary Information

No management person at Axis Wealth Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Emanuel Pinheiro is licensed to sell life and health insurance through Horizon Benefits, LLC. He may engage in product sales with our clients, for which he will receive additional compensation. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under Axis. While Emanuel Pinheiro endeavors at all times to put the interest of our clients first as part of our firm's fiduciary duty, you should be aware that the receipt of additional compensation itself creates a conflict of interest and may affect their judgment when making recommendations. This activity accounts for about 80 hours a month, sometimes during trading hours.

Also, Mr. Pinheiro is the owner of a rental property. He spends about 10 hours a month on this endeavor.

Item 5: Additional Compensation

Emanuel Pinheiro does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Axis.

Item 6: Supervision

Daniel Da Ponte, as President and Chief Compliance Officer of Axis, is responsible for supervision. He may be contacted at the phone number on this brochure supplement.