

Part 2B of Form ADV: *Brochure Supplement*

DBA:



Owen L. Schrum

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This brochure supplement provides information about Owen L. 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 Owen L. Schrum is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: Owen L. Schrum

Born: 1958

Education: Hampden Sydney, Bachelor of Science, Chemistry, 1980.

Wharton – Aresty, Senior Advisor, Finance, 2005.

Certified Investment Management Analyst (CIMA®)[Final Certification Testing at The Wharton School, University of Pennsylvania], 2008.

Business Experience

Schrum Private Wealth Management LLC; Chief Investment Officer, January 2025 to Present

Schrum Private Wealth Management LLC; Chief Executive Officer and Sole Member, August 2021 to December 2024

Dogwood Investment Partners; President, May 2011 to August 2021

Merrill Lynch; First Vice President, Portfolio Manager, November 2006 to May 2011

Morgan Stanley; Senior Vice President, Portfolio Manager, April 1994 to Nov 2006

Item 3 Disciplinary Information

Owen L. Schrum has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

Owen L. 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

Owen L. 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

Owen L. 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.