

*This brochure supplement provides information about Katrina L Wilson-Ross that supplements the Naples Asset Management Co., LLC brochure. You should have received a copy of that brochure. Please contact Katrina L Wilson-Ross if you did not receive Naples Asset Management Co., LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Katrina L Wilson-Ross is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*



Naples Asset Management Company<sup>®</sup>, LLC

Form ADV Part 2B – Individual Disclosure Brochure

*For*

**Katrina L Wilson-Ross**

Personal CRD Number: 4101437

**Investment Adviser Representative**

**NAMCOA<sup>®</sup> - Naples Asset Management Company<sup>®</sup>, LLC**

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Updated: 6/5/2023

## Item 2: Educational Background and Business Experience

**Name:** Katrina L Wilson-Ross      **Born:** 1972

### **Educational Background and Professional Designations:**

#### **Education:**

- Master of Science- University of Florida
- Bachelor of Science in Healthcare Management (Cum Laude)
- (CRIS) Construction Risk Insurance Specialist Designation
- (ERIS) Energy Risk Insurance Specialist Designation

#### **Post-Secondary Education**

- Tuck School of Business at Dartmouth~ Executive Management Program
- University of Richmond, Robins Graduate School of Business, Executive Management Program

#### **Business Background:**

- 02/2011 - Present | CEO/President  
National Insurance Consultants Inc
- 06/2023 - Present | Investment Advisor Representative  
NAMCOA® - Naples Asset Management Company®, LLC
- 01/2000 - 2021 | Various NASD Member Broker Dealer Firms  
Registered Representative / Investment Advisor Representative

#### **Examinations & Licenses:**

- NASSA Series 66 (Uniformed Combined State Law) 2000
- Series 7 (General Securities) 2000-2023
- Series 31 (Futures Managed Funds Examination) 2011
- Texas Resident Life, Annuity and Health Insurance License; Nonresident licensed in the following states: AR, CA, CO, FL, GA, IL, IN, LA, MD, MA, MI, MS, MO, NV, NH, NJ, NY, OH, OR, PA, SC, TN, UT, VA, WA and the District of Columbia
- Texas Adjuster License

- Texas Resident Property and Casualty License: Nonresident licensed in the following: states: AR, CA, CO, FL, GA, IL, IN, LA, MD, MA, MI, MS, MO, NV, NH, NJ, NY, OH, OR, PA, SC, TN, UT, VA, WA and the District of Columbia

### **Associations:**

2023-Present Big Brother and Big Sisters Mentor

2014-Present NMSDC National Minority Supplier Diversity Council

2020-Present National Association of African American Agents (NAAIA)

2021-Present Independent Insurance Agents & Brokers of America (Big I)

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

### **Item 4: Other Business Activities**

Katrina L Wilson-Ross is a 51% owner of National Insurance Consultants Inc, which provides comprehensive Property & Casualty, Group Benefits and Risk Management Consulting services to clients. Investment advice and fee for service planning are offered to clients through Naples Asset Management Company, LLC. Expense reduction services and consulting are offered during the planning process. Katrina receives a fee for these services. Insurance products are also offered from time to time during the planning process. Since 2/2011. Approximately 160 hours per month.

Katrina L. Wilson-Ross is a licensed insurance agent. From time to time, she will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Naples Asset Management Co., LLC always acts in the best interest of the client, including in the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of Naples Asset Management Co., LLC in their capacity as a licensed insurance agent.

## Item 5: Additional Compensation

Katrina L. Wilson-Ross compensated for her services to Naples Asset Management Co., LLC (NAMCOA) by receiving a percentage of the advisory fees that NAMCOA clients pay to NAMCOA for advisory services.

Katrina L Wilson-Ross does not receive any economic benefit from any person, company, or organization, other than as described above, in exchange for providing clients advisory services.

## Item 6: Supervision

As the Chief Compliance Officer of Naples Asset Management Co, LLC Paul McIntyre is responsible for supervising Katrina L Wilson-Ross's activities. Paul McIntyre's contact information is on the cover page of this disclosure document. Katrina L Wilson-Ross adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

