



BELLARS HARRIS  
WEALTH MANAGEMENT

**CRD # 338986**

**FORM ADV - SCHEDULE 2B - GROUP SUPPLEMENT**

**JANUARY 2026**

**[www.bellarsharriswealth.com](http://www.bellarsharriswealth.com)**

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This brochure supplement provides information about the investment adviser representatives ("IARs") of Bellars Harris Wealth Management, LLC ("Bellars Harris") and supplements the Bellars Harris Brochure. You should have received a copy of that Brochure. Please contact Michelle McCarthy, Chief Compliance Officer, by phone at (513) 832-5447 or [michelle.mccarthy@dinsmorecomplianceservices.com](mailto:michelle.mccarthy@dinsmorecomplianceservices.com) if you have any questions about the Form ADV brochure or this supplement, or if you would like to request additional or updated copies of either document

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

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Timothy J. Bellars (CRD # 1787215) .....	1
Claudia P. Bellars, CFP®, CDFA® (CRD # 2210945) .....	3
Brad A. Harris (CRD # 4492677) .....	5
Axel J. Bellars (CRD # 6882122).....	7
Zachary O. Harris (CRD # 7384594) .....	9
Information About Professional Designations .....	11

## **Timothy J. Bellars (CRD # 1787215)**

### **Item 2. Educational Background and Business Experience**

Mr. Bellars was born in 1965

#### **Education**

- Cornell University – BS Industrial & Labor Relations 1987

#### **Business Experience**

- 05/2020 – Present Bellars Harris Wealth Management – Owner
- 10/2025 – 12/2025 CPC Advisors – Investment Adviser Representative
- 04/2022 – 10/2025 Consolidated Planning Corp – Investment Adviser Representative
- 05/2020 – 12/2025 Raymond James Financial Services Inc. – Financial Advisor
- 05/2020 – 05/2022 Raymond James Financial Services Advisors Inc. – Investment Adviser Representative
- 09/2009 – 05/2020 Bank of America, N.A. – Bank Associate/Financial Advisor
- 04/2005 – 05/2020 Merrill Lynch, Pierce, Fenner & Smith, Inc. – Financial Advisor

Mr. Bellars passed the Series 6 (Investment Company Products/Variable Contracts Representative Examination), Series 7 (General Securities Representative Examination), Series 63 (Uniform Securities Agent State Law Examination) and the Series 65 (Uniform Investment Adviser State Law Examination) examinations. He also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018

### **Item 3. Disciplinary Information**

Mr. Bellars does not have any disciplinary information to disclose.

### **Item 4. Other Business Activities**

Mr. Bellars is a licensed insurance agent/broker. He may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Bellars, as a fiduciary, will act in the client's best interest.

### **Item 5. Additional Compensation**

Bellars Harris Wealth Management, LLC is required to disclose information regarding any arrangement under which Mr. Bellars receives an economic benefit from someone other than a client for providing investment advisory services. Bellars Harris Wealth Management, LLC has no information to disclose in relation to this Item.

#### **Item 6. Supervision**

All Supervised Persons (i.e. Bellars Harris's professional team) provide advice to clients. This advice is monitored by other members of Bellars Harris's professional team. Timothy Bellars is Bellars Harris's manager and supervises all activities of the firm, including his own activities. All Supervised Person's compliance-related activities are monitored by our Chief Compliance Officer, Michelle McCarthy. Her compliance-related activities are monitored by Timothy Bellars. Timothy Bellars and Michelle McCarthy can be reached at (757) 704-4201.

## **Claudia P. Bellars, CFP®, CDFA® (CRD # 2210945)**

### **Item 2. Educational Background and Business Experience**

Ms. Bellars was born in 1960

#### **Education**

- University of South Carolina – BS Finance 1982

#### **Business Experience**

- 05/2020 – Present Bellars Harris Wealth Management – Support Company/Owner
- 10/2025 – 12/2025 CPC Advisors – Investment Adviser Representative
- 04/2022 – 10/2025 Consolidated Planning Corp – Investment Adviser Representative
- 05/2020 – 12/2025 Raymond James Financial Services Inc. – Financial Advisor
- 05/2020 – 05/2022 Raymond James Financial Services Advisors Inc. – Investment Adviser Representative
- 11/2009 – 05/2020 Bank of America, N.A. – Bank Associate/Financial Advisor
- 06/2008 – 05/2020 Merrill Lynch, Pierce, Fenner & Smith, Inc. – Financial Advisor

Ms. Bellars passed the Series 7 (General Securities Representative Examination), Series 63 (Uniform Securities Agent State Law Examination) and the Series 65 (Uniform Investment Adviser State Law Examination) examinations. She also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

### **Item 3. Disciplinary Information**

Ms. Bellars does not have any disciplinary information to disclose.

### **Item 4. Other Business Activities**

Ms. Bellars is a licensed insurance agent/broker. She may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Ms. Bellars, as a fiduciary, will act in the client's best interest.

### **Item 5. Additional Compensation**

Bellars Harris Wealth Management, LLC is required to disclose information regarding any arrangement under which Mr. Bellars receives an economic benefit from someone other than a client for providing investment advisory services. Bellars Harris Wealth Management, LLC has no information to disclose in relation to this Item.

#### **Item 6. Supervision**

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## **Brad A. Harris (CRD # 4492677)**

### **Item 2. Educational Background and Business Experience**

Mr. Harris was born in 1964

#### **Education**

- University of Virginia – BA English 1989
- Old Dominion University – Master of Business Administration, IT 2001

#### **Business Experience**

- 05/2020 – Present Bellars Harris Wealth Management – Owner
- 10/2025 – 12/2025 CPC Advisors – Investment Adviser Representative
- 04/2022 – 10/2025 Consolidated Planning Corp – Investment Adviser Representative
- 05/2020 – 12/2025 Raymond James Financial Services Inc. – Financial Advisor
- 05/2020 – Present BAH Enterprises, Inc. – Owner of Support Company
- 05/2020 – 05/2022 Raymond James Financial Services Advisors Inc. – Investment Adviser Representative
- 12/2009 – 05/2020 Bank of America, N.A. – Bank Associate/Financial Advisor
- 04/2005 – 05/2020 Merrill Lynch, Pierce, Fenner & Smith, Inc. – Financial Advisor

Mr. Harris passed the Series 7 (General Securities Representative Examination), Series 9 (General Securities Sales Supervisor - Options Module Examination), Series 10 (General Securities Sales Supervisors - General Module Examination) and the Series 66 (Uniform Combined State Law Examination) examinations. He also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

### **Item 3. Disciplinary Information**

Mr. Harris does not have any disciplinary information to disclose.

### **Item 4. Other Business Activities**

Mr. Harris is a licensed insurance agent/broker. He may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Harris, as a fiduciary, will act in the client's best interest.

### **Item 5. Additional Compensation**

Bellar's Harris Wealth Management, LLC is required to disclose information regarding any arrangement under which Mr. Bellars receives an economic benefit from someone other than a

client for providing investment advisory services. Bellars Harris Wealth Management, LLC has no information to disclose in relation to this Item.

**Item 6. Supervision**

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## Axel J. Bellars (CRD # 6882122)

### Item 2. Educational Background and Business Experience

Mr. Bellars was born in 1996

#### Education

- George Mason University – BS Finance 2018

#### Business Experience

- 05/2020 – Present Bellars Harris Wealth Management – Vice President
- 10/2025 – 12/2025 CPC Advisors – Investment Adviser Representative
- 04/2022 – 10/2025 Consolidated Planning Corp – Investment Adviser Representative
- 05/2020 – 12/2025 Raymond James Financial Services Inc. – Financial Advisor
- 05/2020 – 05/2022 Raymond James Financial Services Advisors Inc. – Investment Adviser Representative
- 07/2018 – 05/2020 Bank of America, N.A. – Bank Associate/Financial Advisor
- 06/2018 – 05/2020 Merrill Lynch, Pierce, Fenner & Smith, Inc. – Financial Advisor

Mr. Bellars passed the Series 7 (General Securities Representative Examination), Series 9 (General Securities Sales Supervisor - Options Module Examination), and the Series 66 (Uniform Combined State Law Examination) examinations. He also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

### Item 3. Disciplinary Information

Mr. Bellars does not have any disciplinary information to disclose.

### Item 4. Other Business Activities

Mr. Bellars is not engaged in any investment-related business or occupation (other than this advisory firm).

### Item 5. Additional Compensation

Bellaris Harris Wealth Management, LLC is required to disclose information regarding any arrangement under which Mr. Bellars receives an economic benefit from someone other than a client for providing investment advisory services. Bellars Harris Wealth Management, LLC has no information to disclose in relation to this Item.

#### **Item 6. Supervision**

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## **Zachary O. Harris (CRD # 7384594)**

### **Item 2. Educational Background and Business Experience**

Mr. Harris was born in 1999

#### **Education**

- College of William & Mary – BA Economics 2021

#### **Business Experience**

- 05/2021 – Present Bellars Harris Wealth Management – Administrative
- 10/2025 – 12/2025 CPC Advisors – Investment Adviser Representative
- 04/2022 – 10/2025 Consolidated Planning Corp – Investment Adviser Representative
- 04/2022 – 05/2022 Raymond James Financial Services Advisors Inc. – Investment Adviser Representative
- 05/2021 – 12/2025 Raymond James Financial Services Inc. – Registered Representative
- 06/2017 – 05/2021 Atlantic Fire Protection Engineering - Administrative

Mr. Harris passed the SIE (Securities Industry Essentials Examination), Series 7 (General Securities Representative Examination), and the Series 66 (Uniform Combined State Law Examination) examinations.

### **Item 3. Disciplinary Information**

Mr. Harris does not have any disciplinary information to disclose.

### **Item 4. Other Business Activities**

Mr. Harris is not engaged in any investment-related business or occupation (other than this advisory firm).

### **Item 5. Additional Compensation**

Bellar's Harris Wealth Management, LLC is required to disclose information regarding any arrangement under which Mr. Bellars receives an economic benefit from someone other than a client for providing investment advisory services. Bellars Harris Wealth Management, LLC has no information to disclose in relation to this Item.

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## Information About Professional Designations

### Certified Financial Planner (CFP®)

Certified Financial Planners are licensed by the CFP Board to use the CFP® mark. CFP® certification requirements:

- Bachelor's degree from an accredited college or university.
- Completion of the financial planning education requirements set by the CFP Board ([www.cfp.net](http://www.cfp.net)).
- Successful completion of the CFP® Certification Exam.
- Three-year qualifying full-time work experience.
- Successfully pass the Candidate Fitness Standards and background check.

### Certified Divorce Financial Analyst® (CDFA)

Certified Divorce Financial Analyst® (CDFA), a professional designation granted by the Institute for Divorce Financial Analysts helps couples and can provide in-depth financial analysis and advice to their attorneys achieve equitable divorce settlements using knowledge of tax law, asset distribution, and short- and long-term financial planning.

Individuals must have a bachelor's degree with three years of on-the job experience or, if no bachelor's degree, five years of relevant experience. Experience has been defined as the following:

- Financial Planning
- Family law practice, or

Experience in three or more of the following:

- Tax code
- Investment advisory or management
- Real estate, mortgage, and reverse mortgage lending
- Life and disability insurance
- Financial therapist or coach

To retain the CDFA designation, individuals must pay the annual reinstatement fee and complete 30 divorce-related hours every two years.