

## Item 1 – Cover Page

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This brochure supplement provides information about Kyle Bochat that supplements the World Investment Advisors, LLC brochure. You should have received a copy of that brochure. Please contact us at (888) 201-5488 or by sending an email to [kate.mach@pensionmark.com](mailto:kate.mach@pensionmark.com) if you did not receive World's brochure or if you have any questions about the contents of this supplement.

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

## Item 2 - Educational Background and Business Experience

Kyle Bochat, b. 1984

### Educational Background

University of Phoenix, Bachelor of Science, Finance  
Certified Exit Planning Advisor®, (CEPA®)  
Certified Private Wealth Advisor®, (CPWA®)

### Business Experience

<b>Firm</b>	<b>Position</b>	<b>Dates</b>
World Investment Advisors, LLC	Investment Advisor Rep.	12/2023 – Present
Financial Potential	Owner	12/2023 – Present
LPL Financial	Registered Representative	05/2017 – 12/2023
Wells Fargo Clearing Services, LLC	Financial Advisor	07/2016 – 05/2017
Edward Jones	Financial Advisor	03/2014 – 07/2016
UHS – Pruitt Corporation	Regional Director of Ops.	02/2010 – 02/2014

**Certified Exit Planning Advisor® - CEPA®**

Designation: Certified Exit Planning Advisor (CEPA®). Issuing Organization: Exit Planning Institute. Prerequisite/Experience Required: Five years of full-time or equivalent experience working directly with business owners as a financial advisor, attorney, CPA, business broker/ investment banker, commercial lender, estate planner, insurance professional, business consultant or in a related capacity. Undergraduate degree from a qualifying institution; if no qualifying degree must submit additional professional work experience (two years of relevant professional experience may be substituted for each year of required undergraduate studies). Exit planning institute member in good standing. Continuing Education: 40 hours every three years

**Certified Private Wealth Advisor® (CPWA®)** is sponsored by the Investments & Wealth Institute. It is an advanced professional certification designed for seasoned professionals who seek knowledge and techniques to address the needs of high-net-worth clients. The program takes a holistic and multidisciplinary approach. Certified professionals are required to have five years' experience in the financial field at certification and hold a Bachelor's degree or one of the following designations (CIMA®, RMA®, CFA®, CFP®, ChFC®, CPA®). Continuing education is a minimum of 40 credit hours within a 2-year period and continued adherence to the Institute's Code of Professional Responsibility.

**Item 3 - Disciplinary Information**

Investment Advisor Representatives are required to disclose all material facts regarding any legal and disciplinary events that would be material to your evaluation of the representative. Kyle Bochat has no information applicable to this Item.

**Item 4 - Other Business Activities**

Advisors are required to disclose other investment related businesses or activities outside of their role of Investment Adviser Representative. Kyle Bochat is also registered with World Investments, Inc., a broker-dealer affiliated with World through common ownership. In addition, he is a licensed insurance agent. This may pose a conflict of interest to the extent that he has a financial incentive to recommend securities, insurance products or other investments that may result in commissions, brokerage fees, 12b-1 fees, or other payments. World is dedicated to acting in your best interests based on fiduciary principles. In addition, you are under no obligation to purchase any recommended brokerage products or insurance products.

**Item 5 - Additional Compensation**

Kyle Bochat does not receive any compensation for advisory services other than fees paid by the client.

**Item 6 - Supervision**

Katherine Mach is the Chief Compliance Officer and is responsible for supervision of all advisory accounts. She can be reached at (888) 201-5488.

Mr. Bochat is required to adhere to World's processes and procedures as described in the firm's Code of Ethics. In order to monitor the advice that Mr. Bochat provides, relevant account opening documents are reviewed when the relationship is established, and client correspondence is reviewed periodically. In addition, account activity is reviewed at least annually to ensure that trading is in line with your stated objectives. Factors that are considered include but are not limited to the following: investment objectives, targeted allocation, current allocation, suitability, performance, number of trades, monthly distributions, concentrated positions, diversification, and outside holdings.