

Brochure Supplement  
(Part 2B of Form ADV)  
Dated 12/14/2018

## Joseph Palko

McDonald Partners LLC  
1301 East 9<sup>th</sup> Street, Suite 3700  
Cleveland, OH 44114  
216-912-0567  
216-912-1461 Fax  
[www.McDonald-Partners.com](http://www.McDonald-Partners.com)  
[jpalko@mcdonald-partners.com](mailto:jpalko@mcdonald-partners.com)

This brochure supplement provides information about Joseph Palko that supplements the McDonald Partners LLC Advisors brochure (Part 2A of Form ADV). Please contact The Chief Compliance Officer at 216-912-0558 if you would like to receive a copy or if you have any questions about the contents of this supplement.

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

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**Education and Business Standards**

Joe Palko was born in 1966, and has resided in Cleveland, Ohio since that time. Mr. Palko graduated from Cleveland State University's Fenn College of Engineering with a Bachelor's Degree in Civil Engineering as well as a Master's Degree in Engineering Mechanics. Mr. Palko was most recently a Financial Advisor and Wealth Strategy Associate with UBS Financial Services. Mr. Palko is currently a financial advisor with McDonald Partners LLC. Mr. Palko has a Series 7, and Series 66 Registration. He also maintains the CERTIFIED FINANCIAL PLANNER (CFP®) designation.

**Disciplinary Information**

None

**Other Business Activities**

Joe Palko is a member of MaxValueFinance, LLC, which is a financial technology company that provides personal-finance information, education, and motivation using big data. The company provides statistical information and algorithmic feedback to customers based on a user-initiated, technology-based interview. Neither Mr. Palko, nor the business, receives commissions, bonuses or other compensation based on the sale of securities or other investment products, or distribution or service ("trail") fees from the sale of mutual funds.

**Additional Compensation**

None

**Supervision**

Joseph Palko is a Financial Advisor with McDonald Partners and adheres to the Firm's Compliance Policies & Procedures Manual and Code of Ethics. His activities within the Brokerage and Advisory business are supervised by the Chief Compliance Officer.