

OMB APPROVAL

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**FORM ADV**

**Uniform Application for Investment Adviser Registration**

**Part II - Page 1**

Name of Investment Adviser:

**Wellington Consulting Services, Inc.**

Address:	(Number and Street)	(City)	(State)	(Zip Code)	Area Code:	Telephone Number:
<b>14325 Willard Rd.</b>	<b>Suite 104</b>	<b>Chantilly</b>	<b>VA</b>	<b>20151</b>	<b>(703)</b>	<b>802-2300</b>

**This part of form ADV gives information about the investment adviser and its business for the use of clients.  
 The information has not been approved or verified by any government authority.**

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(Schedules A, B, C, D, and E are included with Part I of this Form, for the use of regulatory bodies, and are not distributed to clients.)

Potential persons who are to respond to the collection of information contained in this form are not required to respond unless the form displays a currently valid OMB control number.

Applicant: <b>Wellington Consulting Services, Inc.</b>	SEC File Number: <b>801-41552</b>	Date: <b>3-31-05</b>
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**1. A. Advisory Services and Fees.** (check the applicable boxes) For each type of service provided, state the approximate % of total advisory billings from that service. (See instruction below.)

Applicant:

<input checked="" type="checkbox"/>	(1) Provides investment supervisory services .....	<u>100</u> %
<input type="checkbox"/>	(2) Manages investment advisory accounts not involving investment supervisory services .....	_____%
<input type="checkbox"/>	(3) Furnishes investment advice through consultations not included in either services described above .....	_____%
<input type="checkbox"/>	(4) Issues periodicals about securities by subscription .....	_____%
<input type="checkbox"/>	(5) Issues special reports about securities not included in any service described above .....	_____%
<input type="checkbox"/>	(6) Issues, not as part of any services described above, any charts, graphs, formulas, or other devices which clients may use to evaluate securities .....	_____%
<input type="checkbox"/>	(7) On more that an occasional basis, furnishes advice to clients on matters not involving securities .....	_____%
<input type="checkbox"/>	(8) Provides a timing services .....	_____%
<input type="checkbox"/>	(9) Furnishes advice about securities in any manner not described above .....	_____%

(Percentages should be based on applicant's last fiscal year. If applicant has not completed its first fiscal year, provide estimates of advisory billings for that year and state that the percentages are estimates.)

B. Does the applicant call any of the services it checked above financial planning or some similar term? .....	Yes	No
	<input type="checkbox"/>	<input checked="" type="checkbox"/>

C. Applicant offers investment advisory services for: (check all that apply):

<input checked="" type="checkbox"/> (1) A percentage of assets under management	<input type="checkbox"/> (4) Subscription fees
<input checked="" type="checkbox"/> (2) Hourly charges	<input type="checkbox"/> (5) Commissions
<input type="checkbox"/> (3) Fixed fees (not including subscription fees)	<input type="checkbox"/> (6) Other

**D.** For each checked box in A above, describe on Schedule F:

- the services provided, including the name of any publication or report issued by the adviser on a subscription basis or for a fee
- applicant's basic fee schedule, how fees are charged and whether its fees are negotiable
- when compensation is payable, and if compensation is payable before service is provided, how a client may get a refund or may terminate an investment advisory contract before its expiration date

**2. Types of Clients --** Applicant generally provides investment advice to: (check those that apply)

<input checked="" type="checkbox"/> A. Individuals	<input checked="" type="checkbox"/> E. Trusts, estates, or charitable organizations
<input type="checkbox"/> B. Banks or thrift institutions	<input checked="" type="checkbox"/> F. Corporations or business entities other than those listed above
<input type="checkbox"/> C. Investment companies	<input type="checkbox"/> G. Other (describe on Schedule F)
<input checked="" type="checkbox"/> D. Pension and profit sharing plans	

Applicant:

Wellington Consulting Services, Inc.

SEC File Number:

801-41552

Date:

1-6-97

**3. Types of Investments.** Applicant offers advice on the following: (check those that apply)

- |                                     |  |                                     |   |
|-------------------------------------|--|-------------------------------------|---|
| <input checked="" type="checkbox"/> | A. Equity Securities<br>(1) exchange-listed securities<br><input checked="" type="checkbox"/> (2) securities traded over-the-counter<br><input checked="" type="checkbox"/> (3) foreign issues | <input checked="" type="checkbox"/> | H. United States government securities  |
| <input type="checkbox"/>            | B. Warrants  | <input type="checkbox"/>            | I. Options contracts on:<br>(1) securities<br><input type="checkbox"/> (2) commodities  |
| <input checked="" type="checkbox"/> | C. Corporate debt securities<br>(other than commercial paper)  | <input type="checkbox"/>            | J. Futures contracts on:<br>(1) tangibles<br><input type="checkbox"/> (2) intangibles   |
| <input checked="" type="checkbox"/> | D. Commercial paper  | <input type="checkbox"/>            | K. Interests in partnerships investing in:<br>(1) real estate<br><input type="checkbox"/> (2) oil and gas interests<br><input type="checkbox"/> (3) other (explain on Schedule F) |
| <input checked="" type="checkbox"/> | E. Certificates of deposit   | <input type="checkbox"/>            | L. Other (explain on Schedule F)  |
| <input checked="" type="checkbox"/> | F. Municipal securities  |                                     |   |
| <input type="checkbox"/>            | G. Investment company securities<br>(1) variable life insurance<br><input checked="" type="checkbox"/> (2) variable annuities<br><input checked="" type="checkbox"/> (3) mutual fund shares    |                                     |   |

**4. Methods of Analysis, Sources of Information, and Investment Strategies.**

## A. Applicant's security analysis methods include: (check those that apply)

- |   |  |
|---|--|
| (1) <input type="checkbox"/> Charting               | (4) <input checked="" type="checkbox"/> Cyclical           |
| (2) <input checked="" type="checkbox"/> Fundamental | (5) <input type="checkbox"/> Other (explain on Schedule F) |
| (3) <input checked="" type="checkbox"/> Technical   |  |

## B. The main sources of information applicant uses include: (check those that apply)

- |   |  |
|---|--|
| (1) <input checked="" type="checkbox"/> Financial newspapers and magazines    | (5) <input type="checkbox"/> Timing services   |
| (2) <input type="checkbox"/> Inspections of corporate activities              | (6) <input checked="" type="checkbox"/> Annual reports, prospectuses, filings with the<br>Securities and Exchange Commission |
| (3) <input checked="" type="checkbox"/> Research materials prepared by others | (7) <input type="checkbox"/> Company press releases  |
| (4) <input type="checkbox"/> Corporate rating services                        | (8) <input type="checkbox"/> Other (explain on Schedule F)   |

## C. The investment strategies used to implement any investment advice given to clients include: (check those that apply)

- |  |  |
|--|--|
| (1) <input checked="" type="checkbox"/> Long term purchases<br>(securities held at least a year) | (5) <input checked="" type="checkbox"/> Margin transactions  |
| (2) <input checked="" type="checkbox"/> Short term purchases<br>(securities sold within a year)  | (6) <input type="checkbox"/> Option writing, including covered options,<br>uncovered options or spreading strategies |
| (3) <input type="checkbox"/> Trading (securities sold within 30 days)                            | (7) <input type="checkbox"/> Other (explain on Schedule F)   |
| (4) <input type="checkbox"/> Short sales   |  |

Answer all items. Complete amended pages in full, circle amended items and file with execution page (page 1).

**FORM ADV**

**Part II - Page 4**

Applicant: <b>Wellington Consulting Services, Inc.</b>	SEC File Number: <b>801-41552</b>	Date: <b>3-31-02</b>
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**5. Education and Business Standards.**

Are there any general standards of education or business experience that applicant requires of those involved in determining or giving investment advice to clients? ..... Yes  No

(If yes, describe these standards on Schedule F.)

**6. Education and Business Background.**

For:

- each member of the investment committee or group that determines general investment advice to be given to clients, or
- if the applicant has no investment committee or group, each individual who determines general investment advice given to clients (if more than five, respond only for their supervisors)
- each principal executive officer of applicant or each person with similar status or performing similar functions.

On Schedule F, give the:

- name
- formal education after high school
- year of birth
- business background for the preceding five years

**7. Other Business Activities.** (check those that apply)

- A. Applicant is actively engaged in a business other than giving investment advice.
- B. Applicant sells products or services other than investment advice to clients.
- C. The principal business of applicant or its principal executive officers involves something other than providing investment advice.

(For each checked box describe the other activities, including the time spent on them, on Schedule F.)

**8. Other Financial Industry Activities or Affiliations.** (check those that apply)

- A. Applicant is registered (or has an application pending) as a securities broker-dealer.
- B. Applicant is registered (or has an application pending) as a futures commission merchant, commodity pool operator or commodity trading adviser.
- C. Applicant has arrangements that are material to its advisory business or its clients with a related person who is a:
  - (1) broker-dealer
  - (2) investment company
  - (3) other investment adviser
  - (4) financial planning firm
  - (5) commodity pool operator, commodity trading adviser or futures commission merchant
  - (6) banking or thrift institution
  - (7) accounting firm
  - (8) law firm
  - (9) insurance company or agency
  - (10) pension consultant
  - (11) real estate broker or dealer
  - (12) entity that creates or packages limited partnerships

(For each checked box in C, on Schedule F identify the related person and describe the relationship and the arrangements.)

D. Is applicant or a related person a general partner in any partnership in which clients are solicited to invest? ..... Yes  No

(If yes, describe on Schedule F the partnerships and what they invest in.)

**Answer all items. Complete amended pages in full, circle amended items and file with execution page (page 1).**

Applicant: Wellington Consulting Services, Inc.

SEC File Number: 801-41552

Date: 3-10-99

9. Participation or Interest in Client Transactions.

Applicant or a related person: (check those that apply)

- A. As principal, buys securities for itself from or sells securities it owns to any client.
B. As broker or agent effects securities transactions for compensation for any client.
C. As broker or agent for any person other than a client effects transactions in which client securities are sold to or bought from a brokerage customer.
D. Recommends to clients that they buy or sell securities or investment products in which the applicant or a related person has some financial interest.
E. Buys or sells for itself securities that it also recommends to clients.

(For each box checked, describe on Schedule F when the applicant or a related person engages in these transactions and what restrictions, internal procedures, or disclosures are used for conflicts of interest in those transactions.)

10. Conditions for Managing Accounts. Does the applicant provide investment supervisory services, manage investment advisory accounts or hold itself out as providing financial planning or some similarly termed services and impose a minimum dollar value of assets or other conditions for starting or maintaining an account?

Yes No
[X] [ ]

(If yes, describe on Schedule F.)

11. Review of Accounts. If applicant provides investment supervisory services, manages investment advisory accounts, or holds itself out as providing financial planning or some similarly termed services:

A. Describe below the reviews and reviewers of the accounts. For review, include their frequency, different levels, and triggering factors. For reviewers, include the number of reviewers, their titles and functions, instructions they receive from applicant on performing reviews, and number of accounts assigned each.

Please see Schedule F

B. Describe the nature and frequency of regular reports to clients on their accounts.

Please see Schedule F

Applicant: <b>Wellington Consulting Services, Inc.</b>	SEC File Number: <b>801-41552</b>	Date: <b>2-16-01</b>
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**12. Investment or Brokerage Discretion.**

A. Does applicant or any related person have authority to determine, without obtaining specific client consent, the:

- |  |  |   |
|--|--|---|
| (1) securities to be bought or sold? .....               | Yes<br><input checked="" type="checkbox"/> | No<br><input type="checkbox"/>            |
| (2) Amount of the securities to be bought or sold? ..... | Yes<br><input checked="" type="checkbox"/> | No<br><input type="checkbox"/>            |
| (3) Broker or dealer to be used? .....                   | Yes<br><input checked="" type="checkbox"/> | No<br><input type="checkbox"/>            |
| (4) commission rates paid? .....                         | Yes<br><input type="checkbox"/>            | No<br><input checked="" type="checkbox"/> |

B. Does applicant or a related person suggest brokers to clients? .....

Yes  
 No

For each yes answer to A describe on Schedule F any limitations on the authority. For each yes to A(3), A(4), or B, describe on Schedule F the factors considered in selecting brokers and determining the reasonableness of their commissions. If the value of products, research and services given to the applicant or a related person is a factor, describe:

- the product, research and services
- whether clients may pay commissions higher than those obtainable from other brokers in return for those products and services
- whether research is used to service all of applicant's accounts or just those accounts paying for it; and
- any procedures the applicant used during the last fiscal year to direct client transactions to a particular broker in return for products and research services received.

**13. Additional Compensation.**

Does the applicant or a related person have any arrangements, oral or in writing, where it:

- |   |  |                                |
|---|--|--------------------------------|
| A. is paid cash by or receives some economic benefit (including commissions, equipment or non-research services) from a non-client in connection with giving advice to clients? ..... | Yes<br><input checked="" type="checkbox"/> | No<br><input type="checkbox"/> |
| B. directly or indirectly compensates any person for client referrals? .....  | Yes<br><input checked="" type="checkbox"/> | No<br><input type="checkbox"/> |

(For each yes, describe the arrangements on Schedule F.)

**14. Balance Sheet.** Applicant must provide a balance sheet for the most recent fiscal year on Schedule G if applicant:

- has custody of client funds or securities; or
  - requires prepayment of more than \$500 in fees per client and 6 or more months in advance
- Has applicant provided a Schedule G balance sheet? .....
- |  |                                 |   |
|--|---------------------------------|---|
|  | Yes<br><input type="checkbox"/> | No<br><input checked="" type="checkbox"/> |
|--|---------------------------------|---|

**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant: <b>Wellington Consulting Services, Inc.</b>	SEC File Number: <b>801-41552</b>	Date: <b>2-16-01</b>
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(Do not use this Schedule as a continuation sheet for Form ADV part I or any other schedules.)

1. Full name of applicant exactly as stated in item 1A of Part I of Form ADV: <b>Wellington Consulting Services, Inc.</b>	IRS Empl. Ident. No.: <b>54-1620949</b>
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Item of Form (identify)	Answer
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<p>Item 1. - D.</p>	<p style="text-align: center;"><u><b>ADVISORY SERVICES AND FEES</b></u></p> <p>Wellington Consulting Services, Inc. was formed for the purpose of bringing conservative yet truly cutting-edge money management services to both our corporate clientele and individual investors. While our long-term approach to systematic investing allows us to focus easily on retirement planning needs, we have consciously adapted the same techniques - long reserved exclusively for the realm of the institutional investor - and applied them as a <i>process</i> of investing suitable for the individual investor as well. This foundation combined with our commitment to remain at the forefront of innovative thinking embodies our company's motto of ".Solving Tomorrow's Retirement Problems Today".</p> <p>Wellington Consulting Services, Inc. provides four broad advisory services to its clients. These are:</p> <ol style="list-style-type: none"> <li>1. <u><b>Discretionary Mutual Fund Allocation Programs</b></u> <p>These programs provide for the research, selection, allocation and ongoing discretionary management of one or more "families" of no-load investment company securities (mutual funds) or variable annuity sub-accounts. These services are applicable to individual investments, as well as to investments within certain types of retirement accounts.</p> </li> <li>2. <u><b>Limited-Discretionary Managed Account Program</b></u> <p>One program of this type provides investors the ability to combine traditional brokerage account holdings together with a managed no-load mutual fund allocation program in the same account. Although the unmanaged account portion of the portfolio is held on a non-discretionary basis, the arrangement allows for portfolio holdings and performance reporting to be provided in a consolidated format. The other program of this type is very similar except that it is designed primarily for retirement plan participants and allows for the client to choose either an actively managed model portfolios of no-load mutual funds or to "self manage" the account personally.</p> </li> <li>3. <u><b>Fully-Discretionary Managed Account Program</b></u> <p>One program of this type provides investors with a managed portfolio of individual securities and is customizable by client investment objective. The other program provides for the research, selection and ongoing allocation of client assets between one or more separate account managers.</p> </li> </ol>
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**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant: <b>Wellington Consulting Services, Inc.</b>	SEC File Number: <b>801-41552</b>	Date: <b>2-16-01</b>
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(Do not use this Schedule as a continuation sheet for Form ADV part I or any other schedules.)

1. Full name of applicant exactly as stated in item 1A of Part I of Form ADV: <b>Wellington Consulting Services, Inc.</b>	IRS Empl. Ident. No.: <b>54-1620949</b>
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Item of Form (identify)	Answer
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Item 1. - D.  
(Continued)

**4. Non-Discretionary Corporate and Pension Advisory Services.**

This service provides for the research, selection, allocation and ongoing supervision of money managers for direct fund placement.

The first broad advisory service includes two programs; "LAMP" and "Tactics". LAMP consists of SEI's institutional investment company securities. The applicant enables access to, and provides ongoing tactical allocation of these institutional funds. A variety of allocation alternatives, or "model portfolios", are available that allow client customization of allocation objectives to be accommodated. The basic fee schedule for LAMP is as follows and is negotiable.

ANNUAL FEE

2.00%	from	\$ 25,000	to	100,000	plus
1.75%	on next	100,001	to	500,000	plus
1.5	on next	500,001	to	1,000,000	plus
1.0	on next	1,000,001	and higher		

Accounts below \$25,000 per allocation model selected are at the discretion of the applicant.

*Tactics* is similar to LAMP except that it is designed to utilize one retail no-load mutual fund family or variable annuity sub-account group selected by the applicant. *Tactics* basic fee schedule for all accounts is as follows and is negotiable.

ALL "Tactics" ACCOUNTS ANNUAL FEE

1.75%	\$ 15,000 to \$250,000 plus
1.25%	\$250,001 and higher

Accounts below \$15,000 per allocation model selected are at the discretion of the applicant.

The second category of advisory services involves two programs. The first is a non-discretionary managed account addition to a discretionary no-load mutual fund allocation program. This packaging is achieved through a program called "LAMP-Plus". The mutual fund portion of the program works as described above except that selections from multiple mutual fund families are utilized. Desired portfolio holdings that are not mutual funds (termed the "side account") are accommodated on a non-discretionary and non-solicited basis, but are reported in a consolidated format. The basic fee schedule for LAMP-Plus includes an administrative fee of two basis points per quarter plus an annual advisory fee as follows. Fees are negotiable.

**Schedule F of  
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Continuation Sheet for Form ADV Part II**

Applicant: <b>Wellington Consulting Services, Inc.</b>	SEC File Number: <b>801-41552</b>	Date: <b>2-16-01</b>
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(Do not use this Schedule as a continuation sheet for Form ADV part I or any other schedules.)

1. Full name of applicant exactly as stated in item 1A of Part I of Form ADV: <b>Wellington Consulting Services, Inc.</b>	IRS Empl. Ident. No.: <b>54-1620949</b>
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Item of Form (identify)	Answer
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<p><b>Item 1. - D. (Continued)</b></p>	<p><u><b>DISCRETIONARY MUTUAL FUND PORTFOLIO ANNUAL FEE</b></u></p> <p style="text-align: center;">2.00% from \$ 25,000 to 100,000 plus 1.75% on next 100,001 and higher</p> <p><u><b>NON-DISCRETIONARY "SIDE ACCOUNT" ANNUAL FEE</b></u></p> <p style="text-align: center;">1.00% flat fee</p> <p>Accounts below \$25,000 in discretionary assets are at the option of the applicant.</p> <p>The second program of this type known as "<i>Business Solutions</i>" is very similar to LAMP-Plus except that it is designed primarily for retirement plan participants and provides for a choice of discretionary and actively managed portfolio of no-load mutual funds, customized mutual fund portfolios, or for the option to "self-manage" the portfolio personally. The annual fee for the program is .25%, .75% and 1.25% for participants choosing "Self Manage" "Customized Mutual Fund Portfolios or "Fully Managed" respectively.</p> <p>The applicant's third category of advisory services includes two programs. The first is the "Select Program" - a fully discretionary managed account program designed to provide the investor with a portfolio of either conservatively or aggressively oriented growth stocks. A portfolio of individual securities is selected by the applicant commensurate with the client's investment objectives. The basic fee schedule for the Select Program includes an administrative fee of six and one-quarter basis points per quarter plus an annual advisory fee of one and one-half percent. Fees for the program are negotiable and accounts below \$50,000 are at the option of the applicant.</p> <p>The second program of this type is the MAC (Managed Account Connection) program. It provides for the research and selection of separate account managers(s) and the ongoing allocation of client funds between such managers. The annual fee for this service is a flat one percent of assets in the account and is negotiable.</p> <p>The applicant's fourth category of advisory services, its "Advantage-Plus" series of programs, are designed to offer non-discretionary corporate and pension advice. The applicant's "Advantage-Plus 401(k)" typifies this advisory service, offering a customizable selection of over 4000 no-load mutual funds, as well as prepackaged administrative, custodial, and employee support services for the employer. The basic fee schedule for the "Advantage-Plus" series is as follows and is negotiable.</p>
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**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant: <b>Wellington Consulting Services, Inc.</b>	SEC File Number: <b>801-41552</b>	Date: <b>2-16-01</b>
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(Do not use this Schedule as a continuation sheet for Form ADV part I or any other schedules.)

1. Full name of applicant exactly as stated in item 1A of Part I of Form ADV: <b>Wellington Consulting Services, Inc.</b>	IRS Empl. Ident. No.: <b>54-1620949</b>
Item of Form (identify)	Answer

Item 1. - D.  
(Continued)

"ADVANTAGE-Plus" SERIES ANNUAL FEE

1.25%	from	\$	0	to	100,000	plus
1.00%	on next		100,001	to	1,000,000	plus
.75%	on next		1,000,001	to	2,500,000	plus
.50%	on next		2,500,001	to	5,000,000	plus
.25%	on next		5,000,001	and higher		

For all advisory services, fees are payable quarterly in arrears and are charged or refunded on a pro rata basis upon the termination of the client's advisory contract. Fees are fully refunded, however, if the client requests to terminate the advisory contract within five business days of the program establishment date. Either party may terminate an advisory contract on ten days written notice.

Item 5.

EDUCATION AND BUSINESS STANDARDS

Individuals determining recommended managers or investments, or who are otherwise involved in giving investment assistance to clients must have as a minimum a college degree or at least three years of investment or related business experience. As a practical matter such existing personnel have received, in addition to bachelor's degrees in business, advanced business studies and designations, as well as extensive applied investment related business training, licensing and experience.

Item 6.

EDUCATION AND BUSINESS BACKGROUND

Investment Committee Member  
Principal Executive Officer

- Peter Everington Jones, CFP
- Born 3-3-58
- Graduated "With Distinction" from the University of Virginia's McIntire School of Commerce in Charlottesville: B.S. in Commerce - Double concentration in Finance and Management.
- Graduated from the College for Financial Planning in Denver: Certified Financial Planner (CFP)

Having entered the brokerage business in January of 1981, Mr. Jones has since August of 1986 served as a partner and principal of Integrated Resources Equity Corp.'s Tyson's Corner Virginia office, until its reorganization as Wellington Financial Group in October of 1989. Mr. Jones remained a partner and principal of Wellington Financial Group until becoming President upon the company's incorporation in October of 1990. Mr. Jones also serves as Secretary/Treasurer of Wellington Consulting Services, Inc.

**Schedule F of  
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Continuation Sheet for Form ADV Part II**

Applicant: <b>Wellington Consulting Services, Inc.</b>	SEC File Number: <b>801-41552</b>	Date: <b>2-16-01</b>
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(Do not use this Schedule as a continuation sheet for Form ADV part I or any other schedules.)

1. Full name of applicant exactly as stated in item 1A of Part I of Form ADV: <b>Wellington Consulting Services, Inc.</b>	IRS Empl. Ident. No.: <b>54-1620949</b>
Item of Form (identify)	Answer

<p><b>Item 6. (Continued)</b></p>	<p><b>Investment Committee Member Principal Executive Officer</b></p> <ul style="list-style-type: none"> <li>• Stephen Michael Lynch, CFP</li> <li>• Born 8-6-59</li> <li>• Graduated from Old Dominion University in Norfolk, Virginia: B.S. in Finance</li> <li>• Graduated College for Financial Planning in Denver: Certified Financial Planner (CFP)</li> </ul> <p>Mr. Lynch began his brokerage career with DeRand Investment Corp. in 1982. He became a partner of Integrated Resources Equity Corp.'s Tyson's Corner, Virginia office in 1984 and retained this position until the Company's reorganization as Wellington Financial Group in October of 1989. Mr. Lynch became Secretary/Treasurer of Wellington Financial Group upon its incorporation in October of 1990. Mr. Lynch is also president of Wellington Consulting Services, Inc.</p>
<p><b>Item 8.</b></p>	<p><u><b>OTHER FINANCIAL INDUSTRY ACTIVITIES OR AFFILIATIONS</b></u></p> <p>Wellington Financial Group, Inc., a company associated with the applicant, performs pension plan recordkeeping services for the majority of the applicant's pension plan clients.</p>
<p><b>Item 9. - E.</b></p>	<p><u><b>PARTICIPATION OR INTEREST IN CLIENT TRANSACTIONS</b></u></p> <p>From time to time related persons may buy or sell securities also recommended to clients. This fact is routinely made known to such clients upon their association with the applicant. Simultaneous, order executions involving the buying or selling of both client and related party positions are carried out with the client transactions preceding those of any related party.</p>
<p><b>Item 10.</b></p>	<p><u><b>CONDITIONS FOR MANAGING ACCOUNTS</b></u></p> <p>See sections describing the various services offered by the applicant for initial amounts needed to start an account.</p>
<p><b>Item 11. - A.</b></p>	<p><u><b>REVIEW OF ACCOUNTS</b></u></p> <p>Upon implementation of the client's advisory services, market, manager and investment developments are monitored constantly. Investment Committee reviews are conducted approximately monthly at the level of investment manager selection and quarterly at the level of "client objective" updates. At the level of investment manager selection, "Investment Committee Member(s)" choose the managers and related funds/annuities currently represented within the client portfolios. Triggering factors at the investment manager level will include manager performance, economic indicators, percent price movements, change in company/fund fundamentals or market conditions.</p>

**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant: <b>Wellington Consulting Services, Inc.</b>	SEC File Number: 801-41552	Date: 2-16-01
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(Do not use this Schedule as a continuation sheet for Form ADV part I or any other schedules.)

1. Full name of applicant exactly as stated in item 1A of Part I of Form ADV: <b>Wellington Consulting Services, Inc.</b>	IRS Empl. Ident. No.: <b>54-1620949</b>
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Item of Form (identify)	Answer
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Item 11. - B.	<p>All "Investment Adviser Representatives" act as account reviewers under the supervision of the Investment Committee Member(s) at the "client objective" level. Account reviewers are instructed to review investment options or chosen model portfolios based on their continued consistency with client investment objectives, current circumstances and level of sophistication. Current investor objectives are matched with investment categories such as "growth", "aggressive growth or "income". Client accounts will be handled according to their associated Investment Adviser Representative as reviewer at the client level. Additional reviewers will be utilized as necessary to adequately monitor all client accounts on a timely basis. Regular client reports are generated at least quarterly by the account custodian and include a current account valuation as well as a record of transactions and fee summary information.</p>
Item 12. - A.(1)	<p><u>INVESTMENT OR BROKERAGE DISCRETION</u></p> <p>Manager and/or investment selections and ongoing trading are done on a discretionary basis and may be subject to those limitations which the client may impose and to which the applicant may agree. Practically speaking, however, allocation and investment decisions are made at the discretion of the applicant and the selected money managers as indicated by the particular program description while in keeping with the client's stated portfolio objectives.</p>
Item 12. - A.(2)	<p>The amount of securities to be bought or sold may be limited by client direction but, generally, is not. The clients' selected management program and portfolio types effectively dictate such transaction parameters.</p>
Item 12. - A.(3)	<p>The selection of a broker/dealer to be used in connection with client transactions is made primarily for custody of assets rather than trade executions purposes and is made based upon the associated costs and services received. It is possible for individuals related both with the applicant and a broker/dealer to execute transactions with a broker/dealer other than the custodian and to "settle" the transaction with the custodian but as a practical matter is not done.</p> <p>Additionally, the client may forgo any benefit from savings on execution costs that WCS could obtain for other clients, such as negotiating volume discounts on bunched orders; and the client may not receive the same price or commission paid by other clients who utilize different brokers.</p>
Item 13. - A.	<p><u>ADDITIONAL COMPENSATION</u></p> <p>Applicant receives "Center Piece", a portfolio accounting program, and "Schwab-link", a computerized trading and reporting</p>

