

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
March 2017**

**David Howard Glotzer**



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Berkeley, CA 94704  
[www.DeYoeWealthManagement.com](http://www.DeYoeWealthManagement.com)**

**Firm Contact:  
Nancy Wright Cooper  
Chief Compliance Officer**

**This brochure supplement provides information about Mr. Glotzer that supplements our brochure. You should have received a copy of that brochure. Please contact Ms. Cooper if you did not receive DeYoe Wealth Management, Inc.'s brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Glotzer is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2: Educational Background & Business Experience

**David Howard Glotzer**

**Year of Birth:** 1948

### **Educational Background:**

Mr. Glotzer attended Columbia University and the University of Massachusetts Amherst between 1965 and 1972.

### **Business Background:**

- 11/2014 – Present DeYoe Wealth Management, Inc; Investment Adviser Representative
- 11/2014 – Present LPL Financial, LLC dba DeYoe Wealth Management; Registered Representative
- 08/2010 – 10/2014 City National Bank; Private Client Advisor
- 06/2003 – 07/2010 MBSC, LLC; Mass Transfer
- 06/1996 – 07/2010 Mellon Corporation; VP Business Development

### **Exams, Licenses & Other Professional Designations:**

- 2013: Series 7 & 66 Exams
- 2013: CA Insurance License
- 1996: Series 65 Exam

## Item 3: Disciplinary Information

There are no legal or disciplinary events material to your evaluation of Mr. Glotzer.

## Item 4: Other Business Activities

Mr. Glotzer is a registered representative of LPL Financial, LLC, member FINRA/SIPC, and a licensed insurance agent. He may offer products and receive normal and customary commissions as a result of these transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation they may earn.

## Item 5: Additional Compensation

Mr. Glotzer does not receive any other economic benefit for providing advisory services in addition to advisory fees.

## Item 6: Supervision

Nancy Wright Cooper supervises and monitors Mr. Glotzer's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. Cooper if you have any questions about Mr. Glotzer's brochure supplement at 510-848-0012.