

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
March 2019**

**Jonathan K. DeYoe**



**DeYoe**  
Wealth Management  
A REGISTERED INVESTMENT ADVISOR

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

**Firm Contact:  
Jonathan K. DeYoe  
Chief Compliance Officer**

**This brochure supplement provides information about Mr. DeYoe that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. DeYoe 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. DeYoe is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD # 2944114.**

## Item 2: Educational Background & Business Experience

**Jonathan Karl DeYoe, AIF®, CPWA®**

**Year of Birth:** 1971

### **Educational Background:**

- 1994: Montana State University; Bachelor of Arts in Philosophy/Religious Studies
- 1994-1997: Graduate Theological Union; No Degree Earned

### **Business Background:**

- 01/2011 – Present DeYoe Wealth Management, Inc; President & Wealth Advisor
- 11/2002 – 03/2018 LPL Financial, LLC dba DeYoe Wealth Management; Registered Principal
- 02/2011 – 06/2013 Cooperative Center Federal Credit Union; Wealth Advisor

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

- 1997: Series 7, 31, 63 & 65 Exams
- 1997: Life & Health Insurance
- 2003: Series 24 Exam
- 2008: Chartered Private Wealth Advisor (CPWA®)
- 2011: Accredited Investment Fiduciary (AIF®)

The CPWA designation signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for the professional designation, which is centered on private wealth management topics and strategies for high-net-worth clients. Prerequisites for the CPWA designation are a Bachelor's degree from an accredited college or university or one of the following designations or licenses: CIMA®, CIMC®, CFA®, CFP®, ChFC®, or CPA license; have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements and five years of professional client-centered experience in financial services or a related industry. CPWA designees have completed a rigorous educational process that includes self-study requirements, an in-class education component, and successful completion of a comprehensive examination. CPWA designees are required to adhere to IMCA's *Code of Professional Responsibility and Rules and Guidelines for Use of the Marks*. CPWA designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through Investment Management Consultants Association (IMCA).

The AIF® designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF® designation, individuals must complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the AIF® Code of Ethics. In order to maintain the AIF® designation, the individual must annually renew their affirmation of the AIF Code of Ethics and complete six hours of continuing education credits. The certification is administered by the Center for Fiduciary Studies, LLC (a Fiduciary360 (fi360) company).

## Item 3: Disciplinary Information

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

#### **Item 4: Other Business Activities**

Mr. DeYoe is the author of “Mindful Money: Simple Practices for Reaching Your Financial Goals and Increasing Your Happiness Dividend”. Clients may be solicited to purchase copies; however, they are under no obligation to do so.

#### **Item 5: Additional Compensation**

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

#### **Item 6: Supervision**

Jonathan K. DeYoe supervises and monitors activities on a regular basis to ensure self- compliance with our firm’s Code of Ethics. Please contact Mr. DeYoe if you have any questions about the brochure supplement at 510-848-0012.