

**Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
February 2020**

Jonathan K. DeYoe



DeYoe
Wealth Management
A REGISTERED INVESTMENT ADVISOR

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Berkeley, CA 94704**

www.DeYoeWealthManagement.com

**Firm Contact:
Gail Lieberman
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 Ms. Lieberman 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 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.

Mr. DeYoe is a licensed insurance agent/broker. He may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. DeYoe, as a fiduciary, will act in the client’s best interest.

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

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