

Item 1 Cover Page
SUPERVISED PERSON BROCHURE
FORM ADV PART 2B

David W. Donhoff



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This brochure supplement provides information about David W. Donhoff and supplements Leverage Planners Wealth Management, LLC' brochure. You should have received a copy of that brochure. Please contact David W. Donhoff if you did not receive the brochure or if you have any questions about the contents of this supplement.

Additional information about David W. Donhoff (CRD #6658159) is available on the SEC's website at www.adviserinfo.sec.gov.

JANUARY 16, 2025

Brochure Supplement (Part 2B of Form ADV)

Supervised Person Brochure

Principal Executive Officer - David W. Donhoff

- Year of birth: 1962
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Item 2 Educational Background and Business Experience

Educational Background:

- San Diego State University; Bachelor of Science in Business Administration; 1987

Business Experience:

- Leverage Planners Wealth Management, LLC; Investment Advisor Representative; 07/2016 – Present
 - No Bull Financial, LLC dba Leverage Planners; Owner/Insurance Agent; 09/2001 – Present
 - No Bull Financial, LLC dba Leverage Planners Insurance Services; Investment Advisor Representative; 07/2016 – 12/2017
 - Leverage Planners; Owner/Mortgage Broker; 01/2010 – 08/2015
 - No Bull Mortgage; Owner/Mortgage Broker; 09/2001 – 01/2010
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Item 3 Disciplinary Information

Criminal or Civil Action: None to report.

Administrative Proceeding: None to report.

Self-Regulatory Proceeding: None to report.

Item 4 Other Business Activities

David Donhoff is an insurance agent with No Bull Financial, LLC dba Leverage Planners Insurance Services. Mr. Donhoff spends approximately 80% of his time in this capacity. From time to time, he will offer Clients products and/or services from these activities.

This represents a conflict of interest because it gives an incentive to recommend products and services based on the commission or fee received. This conflict is mitigated by disclosures, procedures, and the firm's Fiduciary obligation to place the best interest of the Client first and the Clients are not required to purchase any products or services. Clients have the option to purchase these products or services through another insurance agent of their choosing.

Item 5 Additional Compensation

Mr. Donhoff receives additional compensation in his capacity as an insurance agent, but he does not receive any performance-based fees.

Item 6 Supervision

Since Mr. Donhoff is the sole owner of Leverage Planners Wealth Management, LLC, he is solely responsible for all supervision and formulation and monitoring of investment advice offered to Clients. He will adhere to the policies and procedures as described in the firm's Compliance Manual.

Item 7 Requirements for State-Registered Advisors

Arbitration Claims: None to report.

Self-Regulatory Organization or Administrative Proceeding: None to report.

Bankruptcy Petition: None to report.
