

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

Brian T. Gery



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

Additional information about Brian T. Gery (CRD #8152760) is available on the SEC's website at www.adviserinfo.sec.gov.

AUGUST 27, 2025

Brochure Supplement (Part 2B of Form ADV)

Supervised Person Brochure

Brian T. Gery

- Year of birth: 2003
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Item 2 Educational Background and Business Experience

Educational Background:

- University of Colorado- Boulder; Bachelor of Arts – Economics; 2025

Business Experience:

- Leverage Planners Wealth Management, LLC; Investment Advisor Representative; 08/2025 – Present
 - Full Time Student; 05/2015 – 06/2025
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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

Brian Gery has no outside business activities at this time.

Item 5 Additional Compensation

Brian Gery receives no additional compensation or any performance-based fees.

Item 6 Supervision

Brian Gery is supervised by David Donhoff, Chief Compliance Officer. Mr. Donhoff reviews Brian Gery's work through client account reviews, quarterly personal transaction reports as well as face-to-face and phone interactions. David Donhoff can be reached by telephone at 425-223-4520 or by email at dave@leverageplanners.com.

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.