

Part 2B of Form ADV: *Brochure Supplement*

Eli Weissman
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This brochure supplement provides information about Eli Weissman that supplements the Spire Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Sue McKeown 703-657-6060 if you did not receive Spire Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Eli Weissman is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: Eli Weissman **Born:** 1971

Education

- University of Chicago; Executive Education, CPWA; 2019
- Georgetown University; Executive Certificate, Financial Planning; 2014
- University of Washington; Masters; 1997
- University of Vermont; BS; 1994

Business Experience

- Truist; Financial Advisor; from 02/17/2021 to 06/16/2022
- BB&T Securities; Financial Advisor; from 11/17/2016 to 02/17/2021
- Alexandria Capital; Financial Advisor; from 02/05/2014 to 11/11/2016

Designations

Eli Weissman has earned the following designation(s) and is in good standing with the granting authority:

Certified Financial Planner™; (CFP®) Certified Financial Planner Board of Standards, Inc.; 2016

To earn the CFP designation, professionals must develop their theoretical and practical knowledge by completing a comprehensive course of study at a college or university offering a financial planning curriculum approved by CFP Board. Professionals must then pass the comprehensive CFP® Certification Exam, which tests their abilities to apply financial planning knowledge to real-life situations. The exam covers the financial planning process, tax planning, employee benefits and retirement planning, estate planning, investment management and insurance. CFP® professionals complete several years of experience related to delivering financial planning services to clients prior to earning the right to use the CFP® certification trademarks and are held to the highest of standards, as outlined in CFP Board's Standards of Professional Conduct. They are obligated to uphold the principles of integrity, objectivity, competence, fairness, confidentiality, professionalism and diligence as outlined in CFP Board's Code of Ethics. CFP® professionals are subject to CFP Board sanctions if they violate these standards.

For further information regarding the CFP certification marks, please refer to the website of the Certified Financial Planner Board of Standards, Inc. (CFP Board): <http://www.cfp.net>

Certified Private Wealth Advisor (CPWA); Certified Private Wealth Advisor (CPWA) certification is an advanced education and voluntary standard for advisors who serve high net worth clients. Developed by The Investments &

Wealth Institute™, the CPWA program focuses on the life cycle of wealth-accumulation, preservation, and distribution.

The CPWA certification program requires that candidates meet all eligibility requirements including, five years of financial services experience at the time of application, education requirement which can be completed through a combination of online and in-person executive education, completion of the CPWA Certification Exam, execute a license agreement and agree to adhere to the Investments & Wealth Institute™ Code of Professional Responsibility, Standards of Practice and Rules and Guidance for use of the marks.

CPWA designees must renew certification every two years. Certificants must report 40 hours of continuing education credits, including two ethics hours, complete compliance requirements and pay certification renewal fees.

For further information regarding the CPWA certification, please refer to the Investments & Wealth Institute™ website at: <http://investmentsandwealth.org>.

Item 3 Disciplinary Information

Eli Weissman has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

Eli Weissman is not engaged in any other investment related activities.

B. Non Investment-Related Activities

Eli Weissman is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his or her time.

Item 5 Additional Compensation

Eli Weissman does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6 Supervision

Supervisor: Sal Malik

Title: Director of Supervision

Phone Number: 703-657-6075

In addition to an annual review, each advisor is subject to the following ongoing supervision and review:

- Daily trade reviews
- Monthly review of personal securities accounts
- Monthly review of business bank statements of the DBA
- Correspondence reviews: including ongoing capture and review of email
- Periodic reviews of client account activity