

## **ADV Part 2B Brochure Supplement – Jeremy Kyle David**

### **Item 1 – Cover Page**

**Jeremy Kyle David**

**CRD#4314102**

**Complete Wealth Management, LLC**

**1808 Cornell Lane Ste 140**

**Denton, TX 76201**

**(940) 382-9300**

**September 11, 2019**

This Brochure supplement provides information about Jeremy David and supplements the Complete Wealth Management, LLC (“Complete Wealth Management”) Brochure. You should have received a copy of that Brochure. Please contact Jeremy David if you did not receive the Brochure or if you have any questions about the contents of this supplement.

Additional information about Jeremy David, CRD #: 4314102 is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 – Educational Background and Business Experience

Full Legal Name: Jeremy Kyle David

Year of Birth: 03/21/1979

### Education

Bachelor of Business  
University of North Texas, Denton, Texas

2001

### Designations

CFP<sup>®</sup> 2005

CFP Board of Standards

### Minimum Designation Requirements

#### Certified Financial Planner (CFP)

The CERTIFIED FINANCIAL PLANNER™, CFP<sup>®</sup> and federally registered CFP (with flame design) marks (collectively, the “CFP<sup>®</sup> marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP<sup>®</sup> certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP<sup>®</sup> certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP<sup>®</sup> certification in the United States.

To attain the right to use the CFP<sup>®</sup> marks, an individual must satisfactorily fulfill the following requirements:

**Prerequisites/Experience:** Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year)

**Educational Requirements:** Complete an advanced college level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning.

**Examination Type:** Pass the comprehensive CFP<sup>®</sup> Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances.

**Ethics:** Agree to be bound by CFP Board's Standards of Professional/Conduct, a set of documents outlining the ethical and practice standards for CFP<sup>®</sup> professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP<sup>®</sup> marks:

**Continuing Education/Experience Requirements:** Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct to maintain competence and keep up with developments in the financial planning field.

**Ethics:** Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Business History**

|                                |   |
|--------------------------------|---|
| July 2017 – Present            | Chief Compliance Officer at Complete Wealth Management, LLC   |
| July 2017 – Present            | Member at J2 Residential Holdings, LLC                        |
| February 2007 – September 2015 | Investment Advisor at TLG Advisors Inc                        |
| October 2015 – July 2017       | Registered Representative at J.W. Cole Financial, Inc.        |
| October 2015 – July 2017       | Investment Advisor Representative at J.W. Cole Financial, Inc |
| April 2005 – October 2015      | Registered Representative at The Leaders Group Inc            |

### **Item 3 – Disciplinary History**

Neither Complete Wealth Management nor Jeremy David has any disciplinary history to disclose.

### **Item 4 – Other Business Activities**

As noted in Item 10 (“Other Financial Industry Activities and Affiliations”) of the ADV Part 2A, Jeremy David has the following outside business activities to disclose:

Jeremy David may recommend insurance products and may also, as an independent insurance agent, sell those recommended insurance products to clients. The sale of these products accounts for approximately 6-8 hours per week of his time. When such recommendations or sales are made, a conflict of interest exists as the insurance licensed IARs earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. We require that all IARs disclose this conflict of interest when such recommendations are made. Also, we require IARs to disclose that clients may purchase recommended insurance products from other insurance agents not affiliated with us.

Jeremy David serves as President of Complete Financial Group, Inc. Complete Financial Group, Inc. is an insurance agency. Jeremy David spends approximately 30 hour per month in this role.

Jeremy David is also a Member of J2 Residential Holdings, LLC, a company that owns residential rental properties. Jeremy spends approximately 4 hours per month in this role.

## **Item 5 – Additional Compensation**

Jeremy David may receive additional compensation from sales of insurance products. Jeremy David may be eligible to receive incentive awards (including prizes such as trips or bonuses) for recommending certain types of insurance policies or other investment products that he recommends.

While Jeremy David endeavors at all times to put the interest of our clients first as part of our fiduciary duty, the possibility of receiving incentive awards creates a conflict of interest, and may affect his judgment when making recommendations. We require that all IARs disclose this conflict of interest when such recommendations are made. Also, we require IARs to disclose that clients may purchase recommended insurance products from other insurance agents not affiliated with us.

Jeremy David may also receive additional compensation from his role as Member of J2 Residential Holdings, LLC.

In addition, Jeremy David may receive additional compensation from his role as President of Complete Financial Group, Inc.

## **Item 6 – Supervision**

Jeremy David is the Chief Compliance Officer and performs all supervisory duties for his firm.

## **Item 7 – Requirements for State-Registered Advisers**

Jeremy David has no reportable events to disclose here.