



PLATT WEALTH MANAGEMENT, LLC

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Form ADV Part 2B: Brochure Supplement

Jeffrey S. Platt

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This brochure supplement provides information about the above referenced individuals that supplements Platt Wealth Management, LLC (Platt Wealth Management or PWM) Form ADV Part 2A brochure. You should have received a copy of that brochure. Please contact (619) 255-9554 if you did not receive Platt Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Jeffrey Platt (CRD# 2591205) is available on the SEC's website at www.adviserinfo.sec.gov.

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PROFESSIONAL CERTIFICATIONS

Certified Financial Planner® (CFP®)

Certified Financial Planner Board of Standards Inc. ("CFP Board") requires all CFP® professionals to (1) earn a bachelor's degree from an accredited college or university; (2) gain at least three years of relevant work experience; (3) complete a CFP Board-Registered Program or obtain a waiver; (4) achieve a passing score on the CFP® Certification Examination; and (5) complete 30 hours of continuing education every 24 months.

Chartered Financial Analyst® (CFA®)

CFA Institute requires CFA candidates to (1) have an undergraduate degree, or have a combination of college and full-time work experience adding up to four years. CFA charter holders must have passed three program levels, each culminating in a six-hour exam. These levels emphasize investment tools and concepts, portfolio management, and wealth planning.

Certified Private Wealth Advisor (CPWA®)

The CPWA® certification program from the Investment and Wealth Institute requires that candidates meet all eligibility requirements: (1) have five years of relevant experience, (2) pass CPWA Certification Exam and (3) sign licensing agreement and adhere to the Investments & Wealth Institute Code of Professional Responsibility, Standards or Practice, and Rules and Guidance for use of the marks.

Jeffrey Samuel Platt, CFA®, CFP®

Born: 1953

Education and Designations:

- Bachelor of Arts, Political Science; University of California, Los Angeles, 1975
- Juris Doctor; Western State University, College of Law, 1980
- Certified Financial Planner® (CFP®); Certified Financial Planner Board of Standards Inc., 1994
- Chartered Financial Analyst (CFA®); CFA Institute, 2010

Item 2 - Business Background

Principal/Wealth Advisor, Platt Wealth Management – 2018 to Present

Chief Investment Officer, Wealth Quest Partners, Inc – 2014 to 2018

Portfolio Manager, Harrison – de Charon, LLC – 2008 to 2014

Director of Research, Cullington Hill Advisors – 2004 to 2008

Portfolio Manager, Blankinship & Foster – 2001 to 2004

Item 3 – Disciplinary Information

Platt Wealth Management is required to disclose all material facts regarding any legal or disciplinary event that would be material to your evaluation of each investment person providing advice to you. Mr. Platt has no information to disclose in this regard.

Item 4 – Other Business Activities

Mr. Platt has no activities outside his work with Platt Wealth Management.

Item 5 – Additional Compensation

Mr. Platt receives no compensation outside his work with Platt Wealth Management.

Item 6 – Supervision

Mr. Platt, as the owner of Platt Wealth Management, supervises his own work.