



PLATT WEALTH MANAGEMENT, LLC

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Form ADV Part 2B: Brochure Supplement

Jeffrey S. Platt

James Curtis West

Kai H. Kramer

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This brochure supplement provides information about the above-referenced individuals that supplement 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), Curtis West (CRD# 4920821), and Kai Kramer (CRD# 6814303) 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.

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
- LLM, University of San Diego School of Law, San Diego, 2020

Item 2 - Business Background

Founder, Chief Investment Officer, 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 not been subject to any such legal or disciplinary event and thus has no information to disclose with respect to this Item.

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.

James Curtis West, CFP®

Born: 1978

Education and Designations:

- Bachelor of Science, Management; Clemson University, 2000
- Personal Financial Planning Certificate; San Diego State University, 2009
- Certified Financial Planner® (CFP®); Certified Financial Planner Board of Standards Inc., 2010
- Masters of Science Business Administration; San Diego State University, 2012

Item 2 - Business Background

Lead Financial Advisor, Platt Wealth Management – 2021 to Present

Senior Wealth Advisor, Reilly Financial Advisors – 2013 to 2021

Financial Solutions Advisor, Merrill Lynch – 2012 to 2014

Financial Planner, The Private Bank, Wells Fargo – 2010 to 2012

Regional Private Banker, Wells Fargo Bank – 2005 to 2010

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. West has not been subject to any such legal or disciplinary event and thus has no information to disclose with respect to this Item.

Item 4 – Other Business Activities

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

Item 5 – Additional Compensation

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

Item 6 – Supervision

Mr. West is supervised by Jeffrey S. Platt, owner of Platt Wealth Management.

Kai Hiram Kramer

Born: 1998

Education and Designations:

- Bachelor of Arts, Economics; University of California, Los Angeles, 2020
- Series 65, Uniform Investment Advisor, FINRA, 2022

Item 2 - Business Background

Financial Advisor Associate, Platt Wealth Management, 2022 – Present

Client Service Associate, Platt Wealth Management, 2021 – 2022

Financial Services Intern, Platt Wealth Management, 2021 - 2021

Financial Planning Intern, Ameriprise Financial Services, Inc., 2017 - 2018

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. Kramer has no information to disclose in this regard.

Item 4 – Other Business Activities

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

Item 5 – Additional Compensation

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

Item 6 – Supervision

Mr. Kramer is supervised by Jeffrey S. Platt, owner of Platt Wealth Management. He reviews Mr. Kramer's work through frequent office interactions. Mr. Platt can be contacted at jeff@plattwm.com.