

**SimonDavis Asset Management, Inc.
Form ADV Part 2B Brochure Supplement**

Lois A. Leonhardi, CFA
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SimonDavis Asset Management, Inc.
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Item 2. Educational Background and Experience:

EDUCATION:

Salem State College

B.S. in Business Administration

CFA Institute

Chartered Financial Analyst (CFA)

Business Experience:

SimonDavis Asset Management, Inc.

Vice President, Private Client Services

12/2008 to Present

Leonhardi Investment Management, Inc.

President & Principal

04/1996 to 12/2008

Whitegate Investment Counselors

01/1995 to 04/1996

**Federal Deposit Insurance Corporation
(FDIC)**

Senior Banking Analyst

07/1990 to 01/1995

Gannett, Welsh & Kotler

Portfolio Manager

05/1986 to 07/1990

Robert Hurst & Company CPA

Staff Accountant

09/1985 to 04/1986

Item 3. Disciplinary Information:

None

Item 4. Other Business Activities:

Lois is a part-time yoga instructor and receives compensation from this activity.

Item 5. Additional Compensation:

None

Item 6. Supervision:

SimonDavis Asset Management, Inc. closely monitors the recommendations and planning provided by all of its investment professionals. This is done through monthly and annual compliance meetings, random Associate audits, planned file reviews, clear and concise internal policies and procedures, and strict adherence to all industry laws and regulations. For additional information regarding our internal quality and control procedures please contact: David A. Simon, President of SimonDavis Asset Management at (800) 466-8376; or, via email at: dsimon@simondavisinc.com.