

Liberty Wealth Management, LLC.

1811 E Garry Avenue

Santa Ana CA 92705

(949) 724-8848

Brochure Supplement - Ronald S. Latin (Ron Latin)

3/31/2012

This brochure supplement provides information about Ron Latin that supplements the Liberty Wealth Management, LLC. brochure. You should have received a copy of that brochure. Please contact Ron Latin at (949) 724-8848 if you did not receive Liberty Wealth Management, LLC. brochure or if you have any questions about the contents of this supplement. Additional information about Liberty Wealth Management, LLC. is available on the SEC's website at www.adviserinfo.sec.gov

Educational Background and Business Experience

Ron Latin is a seasoned financial service professional with over four (4) decades of experience. His past experience working with some of the country's largest brokerage firms as a financial services professional. Ron was born in 1950.

Education

B.A. in History	1972
Chapman University	Orange, CA

Designations

CFP®	1986
College of Financial Planning	Denver, CO

Minimum Designation Requirements

Certified Financial Planner (CFP)

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

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® 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® certification in the United States.

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

- **Prerequisites/Experience:** A bachelor's degree (or higher) from an accredited college or university, and three years of full-time personal financial planning experience
- **Educational Requirements:** Candidate must complete a CFP-board registered program, or hold one of the following:
 - CPA
 - ChFC
 - Chartered Life Underwriter (CLU)
 - CFA
 - Ph.D. in business or economics
 - Doctor of Business Administration
 - Attorney's License

- **Examination Type:** CFP Certification Examination
- **Continuing Education/Experience Requirements:** 30 hours every two years

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.

Other Qualifications

Ron Latin is the Managing Member and Chief Compliance Officer (CCO) for Liberty Wealth Management, LLC. He is also a registered representative of Royal Alliance and a Certified Financial Planner (CFP®) professional. He completes continuing professional education in order to keep his designation intact and stay current on developing information in financial planning and investment management.

He is also a member of the National Association of Insurance and Financial Advisors as well as the South Orange County Estate Planning Council.

Business History

2008-Present	Managing Member and CCO, Liberty Wealth Management, LLC.
1997-Present	Principal, Liberty Capital Management, Inc.
1994- Present	Registered Rep. Royal Alliance Associates, Inc.
1992- 1997	Associate, Worldwide Investment Network, Inc.
1992- 1994	Registered Rep., Financial Network Investment, Corp.
1987-1992	Registered Rep., Dreher & Associates

Licenses

Ron Latin has held several FINRA licenses including the Series 7, 24, 53, 63, and 65. He is licensed to transact investment advisory services in California. He also holds California Life and Disability, and Variable Contract licenses. His license number is 0477830.

Disciplinary Information

Ron Latin has no disciplinary history that must be disclosed.

Other Business Activities

Mr. Latin is a long time member of the National Association of Insurance and Financial Advisors. He is a member of the South Orange County Estate Planning Council.

He holds life, disability, and variable life insurance licenses in the state of California, license #0477830. In his role as an insurance agent/broker, he may offer commissionable (non-variable) insurance products to you for which he may receive compensation from insurance companies. He may recommend and sell life, health, and long-term care insurance and will receive the usual and customary commissions. He spends approximately 10% of his time with these products.

Additional Compensation

There is no additional compensation awarded Ron Latin for providing advisory services, such as sales awards or prizes. He may receive additional compensation for sales of insurance products.

Supervision

In the course of his supervisory duties as Chief Compliance Officer, Ron Latin will periodically review advisory accounts, correspondence, financial plans, and advisory activities. Please contact him at (949) 724-8848 with questions regarding supervision.

Philosophy and Specialty

Ron is committed to placing and supporting your interests, to high standards of professional integrity, and maintaining confidentiality. He seeks to provide the highest quality financial planning and wealth management advice to his valued clients. Ron's mission is to help clients develop and execute plans that will build and preserve wealth, protect it against the ravages of taxes and inflation, and create a legacy for the client, their family, and organizations that share their values.

Ron is committed to the precept that by placing his clients' interests first, he will add considerable value to the wealth management process and earn the client's trust and respect. Investment strategies are designed to deliver superior results over the long term using time-tested principles and a well-defined strategy that is intended to withstand the unpredictable nature of the investment markets

Ron Latin specializes in developing financial plans, coordinating major financial transactions, estimating and monitoring long-term financial goals, and money management for individuals. Each aspect of the investment management and financial planning process is tailored to each client's individual needs. He seeks to provide the highest quality financial planning and wealth management advice to his valued clients.

He and his wife, Cindy, have been married for 35 years, live in Laguna Niguel, California and have a grown daughter and two sons. Ron enjoys sailing, golf, and backpacking.