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FORM ADV PART 2B\*

## SEC Required Brochure Supplement:

Professional Background of

Donald L. Watson

March 2012

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\*This brochure supplement provides information about the qualifications of Donald L. Watson, Chief Compliance Officer of SkyOak Wealth Management, Inc. This is a supplement to the SkyOak Wealth Management, Inc. Form ADV Part 2A brochure which you should have received previously. Please contact the Firm if you have not received the brochure or if you have any questions about the contents of this supplement. Additional information about SkyOak Wealth Management, Inc. is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Each member of SkyOak's professional staff is evaluated on the basis of his or her education and work experience. The Firm requires that all principals have a college degree, or substantive investment-related work experience. In addition, any associated persons involved in determining investment strategy or giving investment advice to clients must meet the examination or other licensing requirements of the states in which they provide services.

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## **Item 2 - Educational Background and Business Experience**

### **DONALD L. WATSON**

#### Born

1968

#### Education

University of Washington School of Law, Masters of Laws in Taxation, 1997

Seattle University School of Law, Juris Doctor, 1996

University of Washington, Bachelor of Business Administration, 1991

University of Washington, Bachelor of Arts - Political Science, 1991

University of Washington, Certificate of Study - Political Economics, 1991

FINRA Exams Passed: Series 7, 24, 63 and 66

Insurance Licensed in California, Oregon, and Washington for Life, Disability, Variable Life/Annuity, Long-Term Care, and Property Casualty.

Don was admitted to the Washington Bar Association in 1996.

#### Business Background

2010 - Present	SkyOak Wealth Management, Inc.; Chief Compliance Officer; Medford, OR
2010 - Present	Brokers International Financial Services, LLC; Registered Representative; Panora, IA
2010	Resource Investment Architects, Inc.; Registered Representative/Advisory Associate; Petaluma, CA
2008 - 2009	Edward Jones; Investment Advisor; Medford, OR
2007 - 2008	UBS Financial Services; Investment Advisor; Medford, OR
2006 - 2007	State Farm Insurance; Agent; Medford, OR

2004 - 2006	Phoenix Wealth Management ; Wealth Management Consultant; Medford, OR
1998 - 2004	Kibble & Prentice, Inc.; Staff Attorney & Financial Analyst; Seattle, WA

### Professional and Community Activities

Since gaining his law degree in 1996 and his tax law degree in 1997, Don gained invaluable experience working as a staff attorney and financial analyst for a regional financial services firm in Seattle. Don's area of expertise focuses on estate, business, and tax planning for high net worth individuals and business owners. Since moving to Oregon in 2004, Don has utilized his expertise in helping individuals with asset protection, especially doctors, dentists, and other professionals subject to malpractice lawsuits.

Don grew up in the Seattle area. He moved to Medford in 2004 with his wife, Angela, who was born and raised in Jackson County. Don and Angela have two children, Jacob and Audrey. Don has continued to be involved with charitable organizations since leaving Seattle, working with Rotary International and his church. He has coached youth football, basketball and baseball since 1987. Don enjoys spending time with his family, camping, fishing, and reading.

### **Item 3 - Disciplinary Information**

Don Watson has no legal or disciplinary events or disclosures.

### **Item 4 - Other Business Activities**

Don is a registered representative of Brokers International Financial Services, LLC ("Brokers International"), a federally registered broker-dealer and member of the Financial Industry Regulatory Authority ("FINRA") and the Securities Investors Protection Corporation ("SIPC"). His affiliation with Brokers International allows SkyOak to offer investment programs, insurance products and other products that may incur a commission or sales load when purchased on behalf of clients.

Brokers International Financial Services is independent and unaffiliated with SkyOak and does not supervise SkyOak's investment management services and has no responsibility for the investment management decisions regarding the Firm's clients' assets or any other services it may offer its clients. Equally, SkyOak does not supervise and is not otherwise responsible for the brokerage services provided by Brokers International Financial Services.

Don is a managing director of Sky Oak's affiliated company, SkyOak Asset Protection Group, LLC, an Oregon limited liability corporation, registered in Oregon as an insurance agency ("SOAPG"). Through his affiliation with SOAPG, Don and other SkyOak employees are able to provide insurance products and services to SkyOak clients as licensed insurance agents as well as assist other licensed insurance agents to provide insurance products to clients.

#### **Item 5 - Additional Compensation**

Other than as disclosed in Item 12 of the Firm's Form ADV Part 2A related to unsolicited discounts on software or brokerage services from client custodians, neither the Firm nor any of its employees receive any economic benefit from any non-client for the provision of investment advisory services.

#### **Item 6 - Supervision**

Don's client and personal trading activities are monitored by Ms. Jennifer Davis, the Firm's President and Chief Executive Officer.

#### **Item 7 - Requirements for State-Registered Advisors**

Don has not been the subject of a bankruptcy filing. Nor has he ever been liable for any claim alleging damages in excess of \$2,500, or found liable in any proceeding involving claims of investment-related business activity, fraud, false statements or omissions, theft, embezzlement, other wrongful taking of property, bribery, forgery, counterfeiting, extortion, or dishonest, unfair or unethical practices.

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