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**ITEM 1: COVER PAGE FOR PART 2B OF FORM ADV:  
BROCHURE SUPPLEMENT**

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**DATED: JANUARY 28, 2013**

**TEJAL T. SHAH**

**PENINSULA WEALTH, LLC  
350 TOWNSEND STREET, SUITE 411  
SAN FRANCISCO, CA 94107  
TELEPHONE: (650) 477-2126**

**This brochure supplement provides information about Tejal Shah that supplements our ADV Part 2A brochure. You should have received a copy of that brochure. Please contact Rahul Shah, Managing Member and Chief Compliance Officer, if you did not receive Peninsula Wealth LLC's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Tejal Shah is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD#: 5118939.**

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## ITEM 2. EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

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### **Tejal T. Shah**

Tejal Shah has served as a financial advisor for high net-worth families and businesses since 2006 at Merrill Lynch, where she specialized in retirement planning strategies for high net-worth clients. In addition, she provided comprehensive financial planning advice as well as investment manager selection, investment research/analytics, and business development. Tejal is a Chartered Retirement Planning Counselor™ and has a B.S. in Mechanical Engineering from the University of Rochester in Rochester, NY. As a Co-Founder of Peninsula Wealth, LLC, her responsibilities continue in financial planning as well as business development and operations, account management, and general client service. Tejal lives in San Francisco with her family and enjoys yoga, reading with her book club, and the local dining scene.

**Year of Birth:** 1977

**Educational Background:** 1999: University of Rochester, Rochester, NY: B.S. in Mechanical Engineering

**Business Background:**

- 02/2010 – Present: Peninsula Wealth, LLC: Managing Member and Wealth Advisor
- 06/2012 – Present: Kid Admit, Inc.: Founder and President
- 04/2006 – 02/2010: Merrill Lynch: Financial Advisor
- 09/2004 - 03/2006: American Heart Association: Youth Market Director

**Professional Designation:**

Chartered Retirement Planning Counselor (CRPC®) – A professional designation awarded by the College for Financial Planning to individuals who complete a study program and pass a final multiple-choice examination. Successful applicants earn the right to use the CRPC designation with their names for two years, which can improve job opportunities, professional reputation and pay. Every two years, CRPC professionals must complete 16 hours of continuing education and pay a small fee to continue using the designation. The CRPC program is developed with a focus on client-centered problem solving. Applicants gain in-depth knowledge of individuals' needs both before and after retirement. The study program to become a CRPC covers the entire retirement planning process, including meeting multiple financial objectives, sources of retirement income, personal savings, employer-sponsored retirement plans, income taxes, retirement cash flow, asset management, estate planning and more.

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### ITEM 3. DISCIPLINARY INFORMATION

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If there are legal or disciplinary events material to your evaluation of Tejal Shah, we are required to disclose all material facts regarding those events.

Mrs. Shah does not have disciplinary events to disclose.

**Note:** Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Tejal Shah to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Tejal Shah to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

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### ITEM 4. OTHER BUSINESS ACTIVITIES

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- A. If Tejal Shah is actively engaged in any investment-related business or occupation, including if Tejal Shah is registered, or has an application pending to register, as a broker-dealer, registered representative of a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or an associated person of an FCM, CPO, or CTA, we are required to disclose this fact and describe the business relationship, if any, between the advisory business and the other business.

Mrs. Shah does not participate in any outside investment-related business or occupation. All investment-related business is done through Peninsula Wealth LLC.

- B. If Tejal Shah is actively engaged in any business or occupation for compensation not discussed in response to Item 4.A, above, and the other business activity or activities provide a substantial source of Tejal Shah's income or involve a substantial amount of Tejal Shah's time, we are required to disclose this fact and must describe the nature of that business. If the other business activities represent less than 10 percent of Tejal Shah's time and income, we may presume that they are not substantial.

Mrs. Shah is the Founder and President of Kid Admit, Inc. This outside business activity takes 100 hours per month, 5 hours during trading hours. This presents a potential conflict of interest to clients as Mrs. Shah spends time away from providing advisory services to participate in this activity. Our firm has examined this potential conflict of interest and has determined that Mrs. Shah's outside business activity does not deter from the quality of her management services.

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## **ITEM 5.      ADDITIONAL COMPENSATION**

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If someone who is not a client provides an economic benefit to Tejal Shah for providing advisory services, we are required to generally describe the arrangement. For purposes of this Item, economic benefits include sales awards and other prizes, but do not include Tejal Shah's regular salary. Any bonus that is based, at least in part, on the number or amount of sales, client referrals, or new accounts should be considered an economic benefit, but other regular bonuses should not.

Mrs. Shah does not receive any additional compensation nor economic benefits for advisory services provided to Peninsula Wealth LLC's clients.

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## **ITEM 6.      SUPERVISION**

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We are required to explain how we supervise Tejal Shah, including how we monitor the advice Tejal Shah provides to you. Our firm has to provide the name, title and telephone number of the person responsible for supervising Tejal Shah's advisory activities on behalf of our firm.

Mr. Rahul Shah, Managing Member and Chief Compliance Officer, supervises and monitors Tejal Shah's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Shah if you have any questions about Tejal Shah's brochure supplement at (650) 477-2126.