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

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**Dated: January 18, 2013**

**BRETT W. DAVALOS**

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

**This brochure supplement provides information about Brett Davalos that supplements our ADV Part 2A brochure. You should have received a copy of that brochure. Please contact Rahul Shah, 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 Brett Davalos is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD#: 5591937.**

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## ITEM 2: EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

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### **BRETT W. DAVALOS**

Brett Davalos has been a financial advisor to corporate executives of public and private companies since 2008. He has worked at Merrill Lynch and Morgan Stanley where he specialized in retirement strategies and stock option planning for High Net Worth Individuals. Brett graduated from the University of Arizona in Tucson, AZ with a B.A. in Economics. He joined Peninsula Wealth in 2012 and is responsible for business development and client service. Born and raised in the Bay Area, Brett lives in San Francisco and in his spare time he can be found on the ski slopes in the winter and on the golf course in the summertime.

**Year of Birth:** 1979

**Educational Background:** 2006; University of Arizona; B.S. in Economics

**Business Background:**

- 05/2012 – Present: Peninsula Wealth LLC: Associate
- 07/2011 – 05/2012: Unemployed
- 04/2010 – 07/2011: Morgan Stanley Smith Barney: Financial Advisor
- 02/2010 – 04/2010: Merrill Lynch: Financial Advisor

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## ITEM 3: DISCIPLINARY INFORMATION

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

Brett Davalos 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 Brett Davalos to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Brett Davalos 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 Brett Davalos is actively engaged in any investment-related business or occupation, including if Brett Davalos 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.

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

- B. If Brett Davalos 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 Brett Davalos's income or involve a substantial amount of Brett Davalos'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 Brett Davalos's time and income, we may presume that they are not substantial.

Brett Davalos does not participate in any outside business that is considered substantial to disclose.

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## ITEM 5: ADDITIONAL COMPENSATION

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If someone who is not a client provides an economic benefit to Brett Davalos 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 Brett Davalos'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.

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

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## ITEM 6: SUPERVISION

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

Rahul Shah, Principal and Chief Compliance Officer of Peninsula Wealth, LLC, supervises and monitors Brett Davalos' 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 Brett Davalos' brochure supplement at (650) 477-2126.