

**Item 1: Cover Page for Part 2B of Form ADV:
Brochure Supplement
August 2013**

Jeffery E. Fong

**Concentrum Wealth Management, LLC
6840 Via Del Oro, Suite 205
San Jose, CA 95119**

**Firm Contact:
Jeffery Fong
Chief Compliance Officer**

**Firm Website Address:
www.ConcentrumWealth.com**

This brochure supplement provides information about Jeffery Fong that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Fong if you did not receive Concentrum Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Jeffery Fong is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

Jeffery E. Fong

Year of Birth: 1971

Educational Background:

- 1993: University of Arkansas; BSBA in Banking & Finance

Business Background:

- 04/2013 – Present Concentrum Wealth Management, LLC; Managing Member & CCO
- 04/2013 – Present Purshe Kaplan Sterling Investments, Inc; Registered Representative
- 03/2009 – 04/2013 Raymond James & Associates, Inc; Registered Representative
- 01/2008 – 03/2009 Wachovia Securities, LLC; Mass Transfer
- 04/2006 – 03/2009 A.G Edwards & Sons, Inc; Investment Advisor
- 02/2001 – 04/2006 Salomon Smith Barney; Investment Advisor

Exams, Licenses & Other Professional Designations:

- 1994: Series 7 & Series 63 Exams
- 2001: Series 65 Exam
- 2004: Series 31 Exam
- 2007: CERTIFIED FINANCIAL PLANNER™ (CFP®)

CERTIFIED FINANCIAL PLANNER™ (CFP®)

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered 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 high standard of professional education, stringent code of conduct and standards of practice and ethical requirements that govern professional engagements with clients. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university, pass the comprehensive CFP® Certification Examination, Complete at least three years of full-time financial planning-related experience and agree to be bound by CFP Board's *Standards of Professional Conduct*.

Individuals who become certified must complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial industry and renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients

Item 3: Disciplinary Information

There are no legal or disciplinary events material to the evaluation of Jeffery Fong.

Item 4: Other Business Activities

- A. If Jeffery Fong is actively engaged in any investment-related business or occupation, including if Jeffery Fong 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.

Mr. Fong is a licensed insurance agent. He may offer insurance products and receive normal and customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation he may earn and may not necessarily be in the best interests of the client.

Mr. Fong is a registered representative of Purshe Kaplan Sterling Investments, Inc, member FINRA/SIPC. He may offer securities and receive normal and customary commissions as a result of securities transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation Mr. Fong may earn and may not necessarily be in the best interests of the client.

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

We have nothing to disclose in this regard.

Item 5: Additional Compensation

We have nothing to disclose in this regard.

Item 6: Supervision

Jay C. Fong is a principal of Concentrum Wealth Management, LLC and as such supervises and monitors Jeffery E. Fong's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Jay C. Fong if you have any questions about Jeffery E. Fong's brochure supplement at (669) 900-5490.

Item 7: Requirements for State-Registered Advisers

A. In addition to the events listed in Item 3 of Part 2B, if Jeffery Fong has been involved in one of the events listed below, we disclose all material facts regarding the event.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:

- (a) an investment or an investment-related business or activity;
- (b) fraud, false statement(s), or omissions;
- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

We have nothing to disclose in this regard.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:

- (a) an investment or an investment-related business or activity;
- (b) fraud, false statement(s), or omissions;
- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

We have nothing to disclose in this regard.

B. If Jeffery Fong has been the subject of a bankruptcy petition, we must disclose that fact, the date the petition was first brought, and the current status.

We have nothing to disclose in this regard.