

Item 1 – Cover Page

Danison & Associates, Inc.
2152 Tremont Center
Columbus, Ohio 43221
(614)-487-6040

March, 2017

This Brochure provides information about the qualifications and business practices of Danison & Associates, Inc. (Danison & Associates). If you have any questions about the contents of this Brochure, please contact Tracey Danison, Vice President and Chief Compliance Officer, at 614-487-6040. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission (SEC) or by any state securities authority.

Danison & Associates is a registered investment adviser. Registration of an investment adviser does not imply any level of skill or training. The oral and written communications of an adviser provide you with information about which you determine to hire or retain an adviser.

Additional information about Danison & Associates also is available on the SEC's website at www.adviserinfo.sec.gov. You may search this site using a unique identifying number, known as a CRD number, Danison & Associates CRD Number is 106760.

Form ADV Part 2

Item 2 – Material Changes

In this Item of Danison & Associates, Inc.'s (Danison or the Firm) Form ADV 2, the Firm is required to discuss any material changes that have been made to Form ADV since the last Annual Amendment, dated March 31, 2016.

Since the last Annual Amendment filing, the Firm has no material changes to report; however, we have updated our language throughout the document.

Danison & Associates, Inc.'s Form ADV may be requested at any time, without charge by contacting Tracey Danison, Vice President and Chief Compliance Officer, at 614.487.6040.

Form ADV Part 2

Item 3 -Table of Contents

Item 1 – Cover Page	i
Item 2 – Material Changes	ii
Item 3 -Table of Contents	iii
Item 4 – Advisory Business	1
Item 5 – Fees and Compensation	2
Item 6 – Performance-Based Fees and Side-By-Side Management	3
Item 7 – Types of Clients	3
Item 8 – Methods of Analysis, Investment Strategies and Risk of Loss	3
Item 9 – Disciplinary Information	6
Item 10 – Other Financial Industry Activities and Affiliations	6
Item 11 – Code of Ethics	6
Item 12 – Brokerage Practices	8
Item 13 – Review of Accounts	10
Item 14 – Client Referrals and Other Compensation	10
Item 15 – Custody	11
Item 16 – Investment Discretion	11
Item 17 – Voting Client Securities	11
Item 18 – Financial Information	12
Item 1 – Cover to Brochure Supplement	1
Item 2 – Educational Background and Business Experience	2
Item 3 – Disciplinary Information	2
Item 4 – Other Business Activities	2
Item 5 – Additional Compensation	2
Item 6 – Supervision	2
Item 1 – Cover to Brochure Supplement	3
Item 2 – Educational Background and Business Experience	4
Item 3 – Disciplinary Information	4
Item 4 – Other Business Activities	4

Form ADV Part 2

Item 5 – Additional Compensation 4

Item 6 – Supervision 4

Form ADV Part 2

Item 4 – Advisory Business

Background

Danison & Associates, Inc. (Danison & Associates, the Firm, us, we, ours) began providing independent investment services to its clients in 1993. We serve institutional clients (primarily Taft-Hartley Pension and 401(k) Plans), and individual clients and provide a wide range of investment advisory services.

The principal owner of Danison is Dean Danison, who has been in the financial services industry since 1985.

Advisory Services – Pension Consulting

For pension consulting clients, our investment services typically include developing investment policies, asset allocation, investment manager search and selection, as well as performance monitoring on a regular and continuous basis.

Advisory Services - Individuals

Many of the same investment systems which we use to serve our pension consulting clients are also used to provide investment services for our individual clients. Investment policies, and asset allocation are determined with our clients and portfolios are created based on the clients' individual goals and objectives.

Our investment services for individuals might also include a written financial plan, which is a projection of what may occur in the future. Financial planning will be offered as a component of the overall investment advisory services, and will include a review of a client's current financial situation. A review may include the following components: cash management, risk management, insurance, education funding, goal setting, retirement planning, estate and charitable giving planning, tax planning, and capital needs planning. Danison & Associates does not charge a separate fee for financial planning services.

Danison & Associates provides investment services to individual clients based on the client's expectations, their particular financial situation, financial experience and their risk tolerance.

Tailored Relationships

Danison & Associates tailors investment advisory services to the individual needs of the client. Danison & Associates clients are allowed to impose restrictions on the investments

Form ADV Part 2

in their account. All limitations and restrictions placed on accounts must be presented to Danison & Associates in writing. Clients will retain individual ownership of all securities.

Wrap Fee Programs

Danison & Associates does not participate in a Wrap Fee Program.

Assets Under Management

As of December 31, 2016, Danison & Associates managed a total of \$371,345,618 in assets under management; \$31,237,068 is managed on a discretionary basis of and \$340,108,549 is managed on a nondiscretionary basis.

Item 5 – Fees and Compensation

The specific manner in which fees are charged by Danison & Associates is established in a client's written agreement with Danison & Associates. Danison & Associates charges a fee based on a percentage of assets under management, including cash, which are determined on the last day of the calendar quarter. Danison & Associates will generally bill its fees in arrears on a quarterly basis absent other arrangements requested by the client. Clients may elect to authorize Danison & Associates to directly debit fees from client accounts or to be billed directly. As noted above, Danison & Associates does not charge a separate fee for financial planning services.

Upon termination of any written agreement, any unearned fees will be refunded and any earned, unpaid fees will be due and payable.

Danison & Associates' fee for investment advisory services is exclusive of, and in addition to, brokerage commissions, transaction fees, and other related costs and expenses that the client may incur, including without limitation charges imposed directly by a mutual fund or exchange-traded fund in the client's account as disclosed in the fund's prospectus (e.g., fund management fees), wire transfer and electronic fund fees, and other fees and taxes on brokerage accounts and securities transactions. *Such additional fees and expenses are set and assessed by unaffiliated third-parties (e.g., brokers, custodians, mutual funds), and Danison & Associates does not receive any portion of these commissions, fees, and costs.* Additional information about brokerage practices is described in Item 12.

Danison & Associates, in its sole discretion, may negotiate to charge a lesser management fee based upon certain criteria, including without limitation anticipated future earning capacity, anticipated future additional assets, dollar amount of assets to be managed,

Form ADV Part 2

related accounts, account composition, pre-existing client, account retention, and pro bono activities.

Item 6 – Performance-Based Fees and Side-By-Side Management

Danison & Associates does not charge any performance-based fees (fees based on a share of capital gains on or capital appreciation of the assets of a client).

Danison & Associates manages accounts for a variety of client types. These clients typically invest in similar, if not the same securities. Varying fee schedules may create an incentive for Danison & Associates to place more profitable trades in higher fee paying accounts over other accounts in the allocation of investment opportunities. Danison & Associates has procedures designed and implemented to ensure that all clients are treated fairly and equally, and to prevent this conflict from influencing the allocation of investment opportunities among clients.

Item 7 – Types of Clients

Danison & Associates provides investment advisory services to individual clients, high net worth individuals , and Taft-Hartley pension, profit-sharing and health and welfare plans.

Item 8 – Methods of Analysis, Investment Strategies and Risk of Loss

Danison & Associates provides investment services to the needs of each client based upon their risk and return profile and return expectations. We are conservative, long-term investors who believe in structuring a flexible investment policy that is designed to provide less volatility and more consistent returns. We believe that it is necessary to be flexible within this framework to both take advantage of the ever changing capital markets as well as to protect our client portfolios from unnecessary risk.

Our portfolio strategy is implemented by buying securities, directly and/or through the use of investment managers. Portfolios normally are invested primarily in common stocks of U.S. and foreign companies of any market capitalization. Portfolios therefore may be comprised of any size company, including large, medium and smaller companies. The majority of these securities can be broadly characterized as value stocks where we seek a margin of safety with the goal being the avoidance of permanent loss of capital (as opposed to temporary losses). Portfolios may also be invested in U.S. and foreign fixed-income securities, short-term debt instruments, gold and other precious metals, and futures

Form ADV Part 2

contracts. Under our flexible investment strategy, portfolios may also hold any amount of cash or cash equivalent securities.

We have compiled unique sources of third party research to support our investment strategies. We believe in performing on site due-diligence meetings with investment managers, attending independent investment conferences, and in buying additional independent research from third party sources. We also rely on a variety of additional information sources, including financial newspapers and magazines, company annual reports, prospectuses, and other filings with the SEC and company press releases.

Risks of Investing

Investing in securities involves risk of loss that clients should be prepared to bear. The material risks associated with the strategies employed by Danison & Associates are discussed below.

Market Risk: Market risk refers to the risk related to investments in securities in general and the daily fluctuations in the securities markets. A client's investment is affected by many factors, including fluctuation in interest rates, the quality of the instruments in the client's investment portfolio, national and international economic conditions and general market conditions.

Equity Risk: The value of equity securities can fluctuate—at times dramatically. The prices of equity securities are affected by various factors, including market conditions, political and other events, and developments affecting the particular issuer or its industry or geographic sector.

Management Risk: Danison & Associates' judgments about the performance of a particular investment company, investment manager, asset class or individual security may be incorrect, and there is no guarantee that investments will perform as anticipated.

Small Cap and Mid Cap Company Risk: Investments in small and mid-capitalization companies involve greater risks than investments in larger, more established companies. These companies may not have the size, resources or other assets of large capitalization companies, and may experience higher growth and higher failure rates than do larger companies. Because they may have limited product lines and financial resources, small and mid-capitalization companies also may be more vulnerable to economic, market and industry changes. As a result, share price changes may be more sudden or erratic than the prices of other equity securities, especially over the short term.

Foreign Investment Risk: Foreign investing involves risks not typically associated with U.S. investments. These risks include, among others, adverse fluctuations in foreign currency values, as well as adverse political, social and economic developments affecting a foreign country. In addition, foreign investing involves less publicly available information,

Form ADV Part 2

and more volatile or less liquid securities markets. Investments in foreign countries could be affected by factors not present in the U.S., such as restrictions on receiving the investment proceeds from a foreign country, foreign tax laws, and potential difficulties in enforcing contractual obligations. Foreign accounting may be less transparent than U.S. accounting practices, and foreign regulation may be inadequate or irregular.

Emerging Markets Risk: The securities markets in emerging market countries are less developed and less liquid, and may be subject to greater price volatility. These countries may have relatively unstable governments and deficiencies in regulatory oversight, market infrastructure, shareholder protections and company laws that could expose investors to risks beyond those generally encountered in developed countries. In addition, profound social changes and business practices that depart from norms in developed economies have hindered the orderly growth of emerging economies and their markets in the past and have caused instability. High levels of debt tend to make emerging economies heavily reliant on foreign capital and vulnerable to capital flight. Countries in emerging markets are also more likely to experience high levels of inflation, deflation or currency devaluation, which could hurt their economies and securities markets. For these and other reasons, investments in emerging markets are often considered speculative.

Investment Company Risk: Clients invested in mutual funds, closed-end funds, exchange-traded funds, and other pooled investment funds will indirectly bear fees and expenses charged by the underlying investment funds. Clients also may incur brokerage costs when purchasing exchange-traded funds and closed-end funds. Investments in investment companies are also subject to the risks described in the respective investment company's prospectus.

Interest Rate Risk: Fixed income securities increase and decrease in value based on changes in interest rates. If interest rates increase, the value of fixed income securities generally will decline. On the other hand, if interest rates decline, the value of fixed income securities will generally increase. Securities with longer maturities tend to produce higher yields, but are more sensitive to changes in interest rates and are subject to greater fluctuations in value.

Credit Risk: The issuer of a fixed income security may not be able to make interest and principal payments when due. Generally, the lower the credit rating of a security, the greater the risk that the issuer will default on its obligation, which could result in a loss to the investor.

High Yield Securities Risk: High yield securities provide greater income and opportunity for gain, but entail greater risk of loss of principal. High yield securities are predominantly speculative with respect to the issuer's capacity to pay interest and repay principal in accordance with the terms of the obligation. These securities may be issued by companies which are highly leveraged, less creditworthy or financially distressed. Although these securities generally provide a higher yield than higher-rated debt securities, the high

Form ADV Part 2

degree of risk involved in these securities can result in substantial or total losses. The market for high yield securities is generally less active than the market for higher quality securities and the market price of these securities can change suddenly and unexpectedly.

Gold Risk: Investing in physical gold and the securities of companies in the gold mining sector carry various risks. Prices of gold-related issues are susceptible to changes to U.S. and foreign taxes, currencies, mining laws, inflation, and various market conditions.

Derivatives Risk: Futures contracts or other “derivatives” including hedging strategies, present risks related to their significant prices volatility and risk of default by the counterparty to the contract.

Item 9 – Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of Danison & Associates or the integrity of Danison & Associates’ management. Danison & Associates has no information applicable to this Item.

Item 10 – Other Financial Industry Activities and Affiliations

Danison & Associates is not registered as a broker-dealer, and none of its management persons are registered representatives of a broker-dealer. Neither Danison & Associates nor any of its management persons is registered as (or associated with) a futures commissions merchant, commodity pool operator, or a commodity trading advisor. Danison & Associates has no other financial industry activities or affiliations.

Danison & Associates does not recommend or select other investment advisors for its clients.

Item 11 – Code of Ethics

Danison & Associates has adopted a Code of Ethics for all employees of the Firm describing its high standard of business conduct, and fiduciary duty to its clients. The Code of Ethics includes provisions relating to the confidentiality of client information, a prohibition on insider trading, restrictions on the acceptance of significant gifts and the reporting of

Form ADV Part 2

certain gifts and business entertainment items, and personal securities trading procedures, among other things.

Participation or Interest in Client Transactions – Financial Interest and Principal/Agency Cross

Danison and Associates and its employees do not recommend to clients, or buy or sell for client accounts, securities in which they have a material financial interest.

Danison and Associates does not affect any principal or agency cross securities transactions for client accounts. Danison and Associates will also not agency cross trades between client accounts.

Participation or Interest in Client Transactions – Personal Securities Transactions

Danison and Associates and its employees may buy or sell securities identical to those recommended to clients for their personal accounts.

The Code of Ethics, described above, is designed to assure that the personal securities transactions, activities and interests of the employees of Danison and Associates will not interfere with (i) making decisions in the best interest of advisory clients and (ii) implementing such decisions while, at the same time, allowing employees to invest for their own accounts. Under the Code certain classes of securities have been designated as exempt transactions, based upon a determination that these would materially not interfere with the best interest of Danison and Associates' clients. In addition, the Code requires pre-clearance of many transactions. Nonetheless, because the Code of Ethics in some circumstances would permit employees to invest in the same securities as clients, there is a possibility that employees might benefit from market activity by a client in a security held by an employee. Employee trading is continually monitored under the Code of Ethics, and to reasonably prevent conflicts of interest between Danison and Associates and its clients.

Danison & Associates' clients or prospective clients may request a copy of the Firm's Code of Ethics by calling Tracey Danison, Vice President and Chief Compliance Officer at (614) 487-6040.

Form ADV Part 2

Item 12 – Brokerage Practices

Research and Other Soft Dollar Benefits

Danison and Associates has no written or verbal arrangements whereby it receives soft dollars. See disclosure below in “Other Economic Benefits”.

Directed Brokerage

Danison and Associates generally recommends that non-institutional clients utilize the trading, custody and clearing services of Raymond James Financial Services, Inc. (RJFS).

Factors which Danison and Associates considers in recommending RJFS or any other broker-dealer to clients include their respective financial strength, reputation, execution, pricing, research and service. The commissions and/or transaction fees charged by RJFS may be higher or lower than those charged by other Financial Institutions.

The commissions paid by Danison and Associates clients comply with Danison and Associates’ duty to obtain “best execution.” Clients may pay commissions that are higher than another qualified Financial Institution might charge to effect the same transaction where Danison and Associates determines that the commissions are reasonable in relation to the value of the brokerage and research services received. In seeking best execution, the determinative factor is not the lowest possible cost, but whether the transaction represents the best qualitative execution, taking into consideration the full range of a Financial Institution’s services, including among others, the value of research provided, execution capability, commission rates, and responsiveness. Danison and Associates seeks competitive rates but may not necessarily obtain the lowest possible commission rates for client transactions.

Danison and Associates periodically and systematically reviews its policies and procedures regarding its recommendation of RJFS in light of its duty to obtain best execution.

The client may direct Danison and Associates in writing to use a particular Financial Institution to execute some or all transactions for the client. In that case, the client will negotiate terms and arrangements for the account with that Financial Institution, and Danison and Associates will not seek better execution services or prices from other Financial Institutions or be able to “batch” client transactions for execution through other Financial Institutions with orders for other accounts managed by Danison and Associates. As a result, the client may pay higher commissions or other transaction costs or greater spreads, or receive less favorable net prices, on transactions for the account than would

Form ADV Part 2

otherwise be the case. Subject to its duty of best execution, Danison and Associates may decline a client's request to direct brokerage if, in Danison and Associates' sole discretion, such directed brokerage arrangements would result in additional operational difficulties.

Brokerage for Client Referrals

Danison and Associates may receive client referrals from RJFS or other broker/dealers. This creates a potential conflict of interest in that Danison and Associates may have an incentive to select or recommend a broker-dealer based on receiving client referrals, rather than on a clients' interest in receiving most favorable execution. As described above, Danison and Associates selects brokers based on best (favorable) execution and not on the basis of client referrals.

Other Economic Benefits

Most non-institutional transactions for clients are executed by Raymond James Financial Services, Inc. (RJFS), a registered broker-dealer. Danison & Associates uses the brokerage and custody services of Raymond James, and as such, we receive routine brokerage and custodial services for our clients at a discounted rate. We also receive duplicate client confirmations and bundled duplicate statements; access to a trading desk that services its Registered Investment Advisor Division participants; access to block trading, which provides the ability to aggregate securities transactions and allocate the appropriate shares to client accounts; access to an electronic communication network for client order entry and account information; and computer software and related systems support, which allow Danison & Associates to better monitor and support client accounts maintained at RJFS. Danison & Associates may receive the software and related support at a lower cost because Danison & Associates renders investment management services to clients that maintain assets at RJFS.

By executing transactions through Raymond James, Danison & Associates is able to access many mutual funds without transaction charges and other securities at nominal transaction charges; however, the commissions and/or transaction fees charged by RJFS may be higher or lower than those charged by other broker-dealers. A client may pay a commission price that is higher than another qualified broker-dealer might charge to effect the same transaction where Danison & Associates has determined in good faith that the commissions are reasonable in relation to the value of the brokerage and research services received.

In selecting Raymond James for brokerage and custodial services, Danison & Associates has considered a number of factors, including but not limited to, whether the products,

Form ADV Part 2

services, and prices provided by RJFS are reasonable related to those charged by typical securities firms; whether they could assist the firm in meeting its investment objectives by executing transactions in thinly traded or illiquid securities; whether the commission rate charged is reasonable in relation to the total quality and reliability of the brokerage, research and custodial services made available to the firm for the benefit of the firm's clients, as well as the overall philosophy and business practices of RJFS.

Trade Aggregation

Trade aggregation is the act of trading a large block of a security in a single order. Shares of a purchased security are then allocated to the appropriate accounts in the appropriate proportion. The main purposes of order aggregation are (i) for ease of trading and (ii) to obtain a lower transaction cost associated with trading a larger quantity. Danison & Associates does not aggregate or block trades. As a result, clients purchasing securities around the same time may receive a less favorable price than other clients. In addition, not aggregating trades may result in higher transaction costs, as a client will not benefit from lower transaction cost which might be achieved if the trade was aggregated.

Item 13 – Review of Accounts

Reviews are conducted for each account as needed and agreed upon with the client. Reviews are conducted by Dean Danison, President and Tracey Danison, Vice President and Chief Compliance Officer.

Clients receive written reports at least quarterly from custodial and brokerage firms, which may include individual holdings, cost basis information, deposits and withdrawals, accrued income, dividends, and performance. In addition, clients may receive trade confirmations for each position bought and sold. Danison & Associates may periodically prepare reports or communications related to investment advisory or services provided.

Financial plans are typically reviewed annually or at the request of the client. In addition, clients understand that each written financial plan is a model with a view at one moment in time and will change continually. We will also provide supplemental reports as necessary.

Item 14 – Client Referrals and Other Compensation

Danison & Associates does not pay, nor does it receive, compensation in any form from third-parties for client referrals.

Form ADV Part 2

Item 15 – Custody

Custody – Fee Debiting

Clients may authorize Danison & Associates (in the client agreement) to debit fees directly from the client's account at the broker dealer, bank or other qualified custodian (custodian). Client investment assets will be held with a custodian agreed upon by the client and Danison & Associates. The custodian should be advised in writing of the limitation of Danison & Associates' access to the account. The custodian sends a statement to the client, at least quarterly, indicating all amounts disbursed from the account including the amount of advisory fees paid directly to Danison & Associates.

Clients should receive at least quarterly statements from the broker dealer, bank or other qualified custodian that holds and maintains client's investment assets. Danison & Associates urges clients to carefully review such statements and compare such official custodial records to the account statements that we may provide to you. Our statements may vary from custodial statements based on reporting dates, accounting procedures or valuation methodologies of certain securities.

Item 16 – Investment Discretion

Danison & Associates normally does not receive discretionary authority from institutional clients.

Danison & Associates usually receives discretionary authority from non-institutional (individual) clients at the outset of an advisory relationship in order to select the identity and amount of securities to be bought or sold. In all cases, however, such discretion is to be exercised in a manner consistent with the investment objectives for the particular client.

When selecting securities and determining amounts, Danison & Associates follows the investment policies, limitations and restrictions of the clients for which it advises.

Investment guidelines and restrictions must be provided to Danison & Associates in writing.

Item 17 – Voting Client Securities

Form ADV Part 2

As a matter of Firm policy and practice, Danison & Associates does not have any authority to and does not vote proxies on behalf of advisory clients. Clients retain the responsibility for receiving and voting proxies for any and all securities maintained in client portfolios and should receive them from the broker, bank, or qualified custodian that has custody of the client's assets. Danison & Associates may provide advice to clients regarding the clients' voting of proxies. Clients may contact Tracey Danison at (614) 487-6040 for information about proxy voting.

Item 18 – Financial Information

Registered investment advisers are required in this Item to provide you with certain financial information or disclosures about Danison & Associates' financial condition. Danison & Associates has no financial commitment that impairs its ability to meet contractual and fiduciary commitments to clients. Danison & Associates does not require prepayment of fees of both more than \$1,200 per client, and more than six months in advance; and therefore is not required to provide a balance sheet to clients. Danison & Associates has not been the subject of a bankruptcy proceeding.

Form ADV Part 2B

Item 1 – Cover to Brochure Supplement

Brochure Supplement

Dean Frederick Danison

Danison & Associates, Inc.
2152 Tremont Center
Columbus, Ohio 43221
(614)-487-6040

March 2017

This Brochure Supplement provides information about Dean Frederick Danison That supplements Danison & Associates, Inc.'s Brochure, ADV 2. Please contact Our office if you have any questions about the contents of this supplement.

Additional information about Dean Frederick Danison is available on the SEC's website at www.adviserinfo.sec.gov. You may search this site using a unique identifying number, known as a CRD number for each Supervised Person.

Form ADV Part 2B

Item 2 – Educational Background and Business Experience

Dean Frederick Danison
CRD #1312506

Year of Birth: 1957

Danison & Associates, President, 1993 – Present

Ohio University, Bachelor of Business Administration, 1981

Item 3 – Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. Mr. Danison has no disciplinary event to disclose.

Item 4 – Other Business Activities

See response to Form ADV Part 2A Item 10 – Other Financial Industry Activities and Affiliations.

Item 5 – Additional Compensation

No Supervised Person receives any economic benefit outside of regular salaries or bonuses related to amount of sales, client referrals or new accounts.

Item 6 – Supervision

Dean Frederick Danison, President is responsible for supervising Danison & Associates' advisory activities and managing Danison & Associates' team of supervised persons.

Dean Frederick Danison supervises these persons by holding regular meetings, which may include staff, investment, compliance and other ad hoc meetings. Dean Frederick Danison reviews client reports, emails and trading, Dean Frederick Danison may be reached at (614) 487-6040.

Form ADV Part 2B

Item 1 – Cover to Brochure Supplement

Brochure Supplement

Tracey Marie Danison

Danison & Associates, Inc.
2150 Tremont Center
Columbus, Ohio 43221
(614)-487-6040

March 2017

This Brochure Supplement provides information about Tracey Marie Danison That supplements Danison & Associates, Inc.'s Brochure, ADV 2. Please contact Our office if you have any questions about the contents of this supplement.

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Form ADV Part 2B

Item 2 – Educational Background and Business Experience

Tracey Marie Danison Year of Birth: 1963
CRD #1940028

Danison & Associates, Vice President and Chief Compliance Officer, 1993 –Present

The Ohio State University, Bachelor of Arts, 1988

Item 3 – Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4 – Other Business Activities

See response to Form ADV Part 2A Item 10 – Other Financial Industry Activities and Affiliations.

Item 5 – Additional Compensation

No Supervised Person receives any economic benefit outside of regular salaries or bonuses related to amount of sales, client referrals or new accounts.

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