

Part 2B of Form ADV: *Brochure Supplement*

Item 1 Cover Page

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(previously known as White Lighthouse Investment Management and JJK Investment Management)

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This brochure supplement provides information about John Wanvig that supplements the White Lighthouse \ Investment Management ADV Brochure. You should have received a copy of that ADV Brochure. Please contact John Wanvig at +41 79 952 5182 if you did not receive White Lighthouse Investment Management's ADV Brochure or if you have any questions about the contents of this supplement.

Additional information about White Lighthouse Investment Management is available on the SEC's website at www.adviserinfo.sec.gov.



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Item 2 Educational Background and Business Experience

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John Wanvig - Born 1961

Business Experience:

Financial Planner - Investment Advisor White Lighthouse Investment Management: Lausanne Switzerland 2016 – present

Vice President, Regional Director - General Mills Inc. (CPW: Cereal Partners Worldwide, Lausanne Switzerland) 1998 to 2015

Analyst - Prudential-Bache Securities: New York, New York, USA 1984-1986

Education:

MBA – Harvard University: Harvard Business School 1988

BA - Economics – Cornell University 1984

Certificate in Financial Planning - Kaplan University 2016

John Wanvig is a Financial Planner with White Lighthouse Investment Management S.A.R.L and has completed the Financial Planning Course offered by Kaplan University. He has also taken the CFP® Certification Examination and has received a passing grade. John is now completing the required 2 years of work experience and after this time, he will be authorized by the CFP Board to use the “CFP® trademarks. The Certified Financial Planner™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). John will complete the required 2 years of work experience in April 2018.

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 (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education - 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). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination - Pass the comprehensive CFP® Certification Examination. The examination, administered in an 8 hour period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience - Complete at least two years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics - Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education - 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 planning field.
- Ethics - 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.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.



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Item 3 Disciplinary Action

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There have been no disciplinary events against John Wanvig



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Item 4 Other Business Activities

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John Wanvig is an advisor-mentor in the start-up ecosystem of EPFL University in Lausanne. He has advised several start-up companies over the last several years including Future Instruments, Qloud Lab, and Morphodyne. John will continue to be involved in the EPFL ecosystem and may work with other start-ups in the future.



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Item 5 Additional Compensation

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No additional compensation is received. Compensation is only received directly from clients.



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Item 6 Supervision

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As an employee of White Lighthouse Investment Management INC, John is responsible for serving his clients and abides by the firm's Code of Conduct, which is the CFP Board's Standards of Professional Conduct. He is monitored by the Chief Compliance Officer and supervised by Jonathan Lachowitz.

John abides by the firm's code of ethics, which is also inclusive of the CFP board code of ethics.



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Item 7 Requirements for State Registered Advisors

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Not applicable.

