

Part 2B of Form ADV: *Brochure Supplement*

Item 1 Cover Page

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WHITE LIGHTHOUSE INVESTMENT MANAGEMENT, SARL

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Jeffrey Haindl

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This brochure supplement provides information about Jeffrey Haindl that supplements the White Lighthouse Investment Management brochure. You should have received a copy of that brochure. Please contact Jeffrey Haindl at +41 22 548 1431 if you did not receive White Lighthouse Investment Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Jeffrey Haindl and White Lighthouse Investment Management are available on the SEC's website at www.adviserinfo.sec.gov and on the White Lighthouse web-site at www.white-lighthouse.com.



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Item 2 Educational Background and Business Experience

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Jeffrey Haindl - Born 1970

Business Experience:

WHITE LIGHTHOUSE INVESTMENT MANAGEMENT, SARL, 2018-present

Financial Planner - Investment Advisor

FALCON PRIVATE BANK, Ltd, Zurich, 2010-2017:

Head Investment Solutions, 2013-2017: Global Head of Investment Solutions, Managing Director, responsible for Portfolio Management, Advisory, Funds and Structured Solutions. Chairman of the Board of Directors of Falcon Fund Management in Luxembourg; Vice-Chairman of the Board of Directors and of the Audit and Risk Committee of Falcon Private Wealth Dubai; Chairman of the Product Approval Committee; Employee representative of the Board of Trustees of the bank's pension fund.

Head Product Management, 2011-2013

Head Hedge Funds, 2010-2011

STANDARD CHARTERED BANK, New York, 2008-2009

Co-Head of Hedge Fund Investments

AMERICAN EXPRESS CORPORATION, New York, 2004-2008

Strategy Head, Co-Head of Hedge Fund Investments

BANK JULIUS BAER, New York, 2001-2004

Strategy Head Hedged Equity Research

BANK JULIUS BAER, Zurich, 1998-2001

Hedge Fund Analyst

SWX (Swiss Stock Exchange), Zurich, 1994-1996

Price reporter in trading rings

Education:

Lic. oec. publ., Master's degree in economics, University of Zurich 1997

CFA® charterholder – CFA Institute 2002

Jeffrey Haindl is a CFA® charterholder and member of the CFA Society Switzerland.

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute — the largest global association of investment professionals.

There are currently more than 138,000 CFA charterholders working in 134 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.



High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

Global Recognition

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders—often making the charter a prerequisite for employment.

Additionally, regulatory bodies in over 30 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

Comprehensive and Current Knowledge

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

To learn more about the CFA charter, visit www.cfainstitute.org.

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Item 3 Disciplinary Action

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There have been no disciplinary events against Jeffrey Haindl



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Item 4 Other Business Activities

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Jeffrey Haindl is the owner and principal of WaferBay Haindl, a research, advisory and governance services firm focusing on corporate clients. He is also a member of the board of directors and partner of Bizzeps AG, a company focusing on insights-driven strategy, innovation and transformation solutions for corporate clients. Both firms operate independently from and White Lighthouse Investment Management S.A.R.L. and White Lighthouse Investment Management, Inc.



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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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Jeffrey Haindl abides by the firm's Code of Conduct which are the CFP® Board's Standards of Professional Conduct. He is monitored by Jonathan Lachowitz, the firm's Owner and Chief Compliance Officer.

Jeffrey Haindl abides by the firm's Code of Ethics which also includes the CFP® Board's Code of Ethics.

WLIM SARL is subjected to annual audits of compliance as governed by the SRO Polyreg for both compliance to anti-money laundering regulations and compliance to the PolyAsset Code of Conduct. This code of conduct is similar in nature to the fiduciary standard; is required to be given to all clients and requires special contractual terms for the protection of client interests.

Item 7 Requirements for State Registered Advisors

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Jeffrey Haindl has **never** been found liable in any arbitration claim alleging damages in excess of \$2500 (or any amount) involving: investments, investment related activities, fraud, false statements, omissions, theft, embezzlement, wrongfully taking property, bribery, forgery, counterfeiting, extortion or dishonest, unfair or unethical practices or for any other matter.

Jeffrey Haindl has **never** been found liable in any civil, self-regulatory organization or administrative proceeding involving: investments, investment related activities, fraud, false statements, omissions, theft, embezzlement, wrongfully taking property, bribery, forgery, counterfeiting, extortion or dishonest, unfair or unethical practices or for any other matter.

Jeffrey Haindl has **never** been the subject of a bankruptcy petition

