

Form ADV Part 2B



MODEL WEALTH, INC.
A Registered Investment Adviser

www.modelwealth.com

Investment Adviser Brochure Supplement
for
Randall Thomas Bruns

CRD #4416255

October 10, 2024

This brochure supplement provides information about Randall T. Bruns that supplements Model Wealth's Part 2A of form ADV Firm Brochure. You should have received a copy of that brochure, if you did not or have questions regarding the brochure, please contact us at (630) 381-1170, and a copy will be provided to you.

This brochure supplement provides information about the Firm's Supervised Persons that supplements Model Wealth, Inc. brochure. You should have received a copy of that brochure. Please contact Alex Offerman, Chief Compliance Officer, if you did not receive Model Wealth, Inc. brochure or if you have any questions about the contents of this supplement.

Item 2 - Educational Background and Business Experience

Randall Thomas Bruns

Born 1979

Employment History (5 years):

- Model Wealth, Inc. d/b/a
Model Wealth 2019 – Present
 - Founder/Senior Financial Planner
- HighPoint Advisor Group, LLC d/b/a
Model Wealth Inc. 2018 – 2019
 - Senior Financial Planner
- HighPoint Advisor Group, LLC d/b/a
HighPoint Planning Partners, LLC 2012 – 2018
 - Wealth Advisor

Education:

Millikin University – Bachelor of Science, Marketing

Professional Designations and Licenses:

Series 66, RICP®, CFP®

Professional Certifications

Mr. Bruns holds the CFP® – Certified Financial Planner professional designation issued by, which requires the following minimum requirements as issued by the Certified Financial Planner Board of Standards, Inc.:

Prerequisites/Experience Required: Candidate must meet the following requirements:

- A bachelor's degree (or higher) from an accredited college or university, and
- 3 years of full-time personal financial planning experience

Educational Requirements: Candidate must complete a CFP-board registered program, or hold one of the following:

- CPA
- ChFC
- Chartered Life Underwriter (CLU)
- CFA
- Ph.D. in business or economics
- Doctor of Business Administration
- Attorney's License

Examination Type: CFP® Certification Examination

Continuing Education/Experience Requirements: 30 hours every 2 years

Item 3 - Disciplinary Information

Mr. Bruns does not have any reportable disciplinary disclosure.

Item 4 - Other Business Activities

Mr. Bruns does not have any other business activities.

Item 5 - Additional Compensation

Mr. Bruns does not receive any economic benefit outside of regular salaries or bonuses.

Mr. Bruns does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

Item 6 – Supervision

Alex Offerman, Chief Compliance Officer, is responsible for supervising the advisory activities of Mr. Bruns. Mr. Offerman can be reached at (630) 381-1170.

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MODEL WEALTH, INC.
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Investment Adviser Brochure Supplement
for
Alex Connor Offerman

CRD #6263464

October 10, 2024

This brochure supplement provides information about Alex Connor Offerman that supplements Model Wealth's Part 2A of form ADV Firm Brochure. You should have received a copy of that brochure, if you did not or have questions regarding the brochure, please contact us at (630) 381-1170, and a copy will be provided to you.

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Item 2 - Educational Background and Business Experience

Alex Connor Offerman

Born 1993

Employment History (5 years):

- Model Wealth, Inc. d/b/a
Model Wealth 2019 – Present
 - Senior Financial Planner
- HighPoint Advisor Group, LLC d/b/a
Model Wealth Inc. 2018 – 2019
 - Senior Financial Planner
- HighPoint Advisor Group, LLC d/b/a
HighPoint Planning Partners, LLC 2016 – 2018
 - Financial Planning Assistant

Education:

Aurora University – Bachelor of Business Administration and Finance

Professional Designations and Licenses:

Series 65, CFP®

Professional Certifications

Mr. Offerman holds the CFP® – Certified Financial Planner professional designation issued by, which requires the following minimum requirements as issued by the Certified Financial Planner Board of Standards, Inc.:

Prerequisites/Experience Required: Candidate must meet the following requirements:

- A bachelor's degree (or higher) from an accredited college or university, and
- 3 years of full-time personal financial planning experience

Educational Requirements: Candidate must complete a CFP-board registered program, or hold one of the following:

- CPA
- ChFC
- Chartered Life Underwriter (CLU)
- CFA
- Ph.D. in business or economics
- Doctor of Business Administration
- Attorney's License

Examination Type: CFP® Certification Examination

Continuing Education/Experience Requirements: 30 hours every 2 years

Item 3 - Disciplinary Information

Mr. Offerman does not have any reportable disciplinary disclosure.

Item 4 - Other Business Activities

Mr. Offerman sits on the Board of Directors for the Financial Planning Association (FPA) of Illinois. Mr. Offerman dedicates approximately 3 hours per month to tasks associated with the FPA.

Item 5 - Additional Compensation

Mr. Offerman does not receive any economic benefit outside of regular salaries or bonuses.

Mr. Offerman does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

Item 6 – Supervision

Mr. Offerman serves as the Chief Compliance Officer of Model Wealth and there is no one in a supervisory capacity over him. Model Wealth has implemented a Code of Ethics and internal compliance that guide each Supervised Person in meeting their fiduciary obligations to clients of Model Wealth. If you have any questions, Mr. Offerman can be reached at (630) 381-1170.

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MODEL WEALTH, INC.
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Investment Adviser Brochure Supplement
for
Anna Leigh Thornburg

CRD #6482378

October 10, 2024

This brochure supplement provides information about Anna L. Thornburg that supplements Model Wealth's Part 2A of form ADV Firm Brochure. You should have received a copy of that brochure, if you did not or have questions regarding the brochure, please contact us at (630) 381-1170, and a copy will be provided to you.

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Item 2 - Educational Background and Business Experience

Anna Leigh Thornburg

Born 1990

Employment History (5 years):

- Model Wealth, Inc. d/b/a
Model Wealth 2021 – Present
 - Director of Operations
- Covenant Classical School 2019 – 2021
 - Office Manager
- Church of the Resurrection 2015 – 2019
 - Office and Facilities Manager, Youth Ministry Admin

Education:

Mount Vernon Nazarene University- Bachelor of Arts in English Education

Professional Designations and Licenses:

Series 65

Item 3 - Disciplinary Information

Mrs. Thornburg does not have any reportable disciplinary disclosure.

Item 4 - Other Business Activities

Mrs. Thornburg does not have any other business activities.

Item 5 - Additional Compensation

Mrs. Thornburg does not receive any economic benefit outside of regular salaries or bonuses.

Mrs. Thornburg does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

Item 6 – Supervision

Alex Offerman, Chief Compliance Officer, is responsible for supervising the advisory activities of Mrs. Thornburg. Mr. Offerman can be reached at (630) 381-1170.

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MODEL WEALTH, INC.
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Investment Adviser Brochure Supplement
for
Donovan Sanchez

CRD #6594768

October 10, 2024

This brochure supplement provides information about Donovan Sanchez that supplements Model Wealth's Part 2A of form ADV Firm Brochure. You should have received a copy of that brochure, if you did not or have questions regarding the brochure, please contact us at (630) 381-1170, and a copy will be provided to you.

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Item 2 - Educational Background and Business Experience

Donovan Sanchez

Born 1986

Employment History (5 years):

- Model Wealth, Inc. d/b/a Model Wealth 2023 – Present
 - Director of Education / Senior Financial Planner
- University of Illinois Urbana-Champaign 2021 – Present
 - Financial Planning Instructor
- Skyview Financial Planning, LLC. 2018 – 2023
 - Founder and Owner
- Savant Capital Management 2018 – 2018
 - Financial Advisor

Education:

Golden Gate University – Master of Science in Advanced Financial Planning with a Concentration in Taxation.

Brigham Young University - Bachelor of Arts, English Teaching

Professional Designations and Licenses:

Series 65, CFP®

Professional Certifications

Mr. Sanchez holds the CFP® – Certified Financial Planner professional designation. This designation is issued by the Certified Financial Planner Board of Standards, Inc.

Prerequisites/Experience Required: Candidate must meet the following requirements:

- A bachelor's degree (or higher) from an accredited college or university, and
- 3 years of full-time personal financial planning experience

Educational Requirements: Candidate must complete a CFP-board registered program, or hold one of the following:

- CPA
- ChFC
- Chartered Life Underwriter (CLU)
- CFA
- Ph.D. in business or economics
- Doctor of Business Administration
- Attorney's License

Examination Type: CFP® Certification Examination

Continuing Education/Experience Requirements: 30 hours every 2 years

Item 3 - Disciplinary Information

Mr. Sanchez does not have any reportable disciplinary disclosure.

Item 4 - Other Business Activities

Mr. Sanchez is a financial planning instructor at the University of Illinois Urbana-Champaign. Mr. Sanchez is responsible for developing and teaching university coursework, mentoring and advising students, and engaging in other work related to the university and student service. Mr. Sanchez dedicates 160 hours per month to university duties during the nine-month academic year.

Mr. Sanchez is a passive partner in Sanchez Brothers, LLC, Sanchez Snow, LLC, and Sanchez St. George Student Housing, LLC. Mr. Sanchez dedicates no time to business activities associated with these companies.

Mr. Sanchez sits on the Board of Directors for the Financial Planning Association (FPA) of Illinois. Mr. Sanchez dedicates approximately 5 hours per month to tasks associated with the FPA.

Item 5 - Additional Compensation

Mr. Sanchez does not receive any economic benefit outside of regular salaries or bonuses.

Mr. Sanchez does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

Item 6 – Supervision

Alex Offerman, Chief Compliance Officer, is responsible for supervising the advisory activities of Mr. Sanchez. Mr. Offerman can be reached at (630) 381-1170.