

SUPERVISED PERSON BROCHURE

FORM ADV PART 2B

Jonathan Hammond Gardner Jr.



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This brochure supplement provides information about Jonathan Gardner and supplements the Diamond Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Jonathan Gardner if you did not receive the brochure or if you have any questions about the contents of this supplement.

Additional information about Jonathan Gardner (CRD #7036136) is available on the SEC's website at www.adviserinfo.sec.gov.

April 2024

Brochure Supplement (Part 2B of Form ADV)

Supervised Person Brochure

Jonathan Hammond Gardner Jr.

- Year of birth: 1988

Item 2 Educational Background and Business Experience

Educational Background:

- University of Arizona; Bachelor of Science in Finance; 2017

Business Experience:

- Diamond Wealth Management, LLC; Investment Advisor Representative; 10/2018-Present
- Diamond Wealth Management, LLC, Trainee; 07/2018 – 10/2018
- Raytheon; Financial Analyst; 06/2016 – 06/2018

Item 3 Disciplinary Information

Criminal or Civil Action: None to report.

Administrative Proceeding: None to report.

Self-Regulatory Proceeding: None to Report

Item 4 Other Business Activities

Jonathan Gardner is a Certified Divorce Financial Analyst® (CDFA®), and is a member of the Collaborative Law Group of Southern Arizona. In this role, Mr. Gardner participates in collaborative divorce and mediation cases where he provides financial expertise in the division of assets.

Jonathan Gardner has a financial industry affiliated business as a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. Less than 10% of his time is spent on the sale of insurance products.

From time to time, he will offer clients advice or products from those activities. These practices represent a conflict of interest because it gives Mr. Gardner an incentive to recommend products or services based on the fees received. This conflict is mitigated by disclosures, procedures, and the firm's Fiduciary obligation to place the best interest of the client first and the clients are not required to purchase any products. Clients have the right to purchase these products and services through another firm or representative of their choosing.

Item 5 Additional Compensation

Jonathan Gardner receives no additional compensation in any capacity, nor does he received any performance based fees.

Item 6 Supervision

Jonathan Gardner is supervised by David Hill, Chief Compliance Officer of DWM. He reviews Mr. Gardner's work through client account review, quarterly personal

transaction reports as well as face-to-face and phone interactions. David Hill can be contacted at the following information: PHONE: 801-216-4811 EMAIL: dave@diamondwealthmgt.com.