

# SUPERVISED PERSON BROCHURE

FORM ADV PART 2B

Ronald T. Sperry



**Diamond**

*Wealth Management, LLC*

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

Additional information about Ronald T. Sperry (CRD #2780335 is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**March 2024**

## Brochure Supplement (Part 2B of Form ADV)

### Supervised Person Brochure

**Ronald T. Sperry**

- Year of birth: 1968

### Item 2 Educational Background and Business Experience

Educational Background:

- University of Utah; Bachelor of Science Degree; Business-Finance; 1995

Business Experience:

- Diamond Wealth Management, LLC; Investment Advisor Representative; 01/2021 – Present
- Independent Insurance Agent; 05/2008 - Present
- Ashton Thomas Private Wealth; Investment Advisor Representative; 09/2020 – 11/2020
- Unemployed; 03/2019 – 08/2020
- Resources Investment Advisors; Investment Advisor Representative; 06/2018 – 02/2019
- Triad Advisors LLC dba 401K Advisors Intermountain; Registered Representative; 07/2018 – 11/2018
- Unemployed; 10/2017 – 05/2018
- Charles Schwab & Co., Inc.; Investment Advisor Representative; 10/2008 – 10/2017
- Charles Schwab & Co., Inc.; Registered Representative; 06/2008 – 10/2017

### 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

Mr. Sperry does not have any Other Business Activities to report.

### Item 5 Additional Compensation

Ron Sperry receives additional compensation in his capacity as an insurance agent. He does not receive any performance-based fees.

**Item 6 Supervision**

Ron Sperry is supervised by David Hill, Chief Compliance Officer of DWM. He reviews Mr. Sperry's work through client account reviews, 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