

*This brochure supplement provides information about David W. Sommer that supplements the St. Clair Advisors, LLC brochure. You should have received a copy of that brochure. Please contact David W. Sommer, Chief Investment Officer if you did not receive St. Clair Advisors, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about David W. Sommer is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

# ST. CLAIR

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## ADVISORS LLC

Family Office Services | Investment Advisory | Wealth Transfer Planning

### Form ADV Part 2B – Individual Disclosure Brochure

*for*

**David W. Sommer**

Personal CRD Number: 4648614

Investment Adviser Representative

St. Clair Advisors, LLC  
6120 Parkland Boulevard, Suite 306  
Mayfield Heights, Ohio, 44124  
(216) 925-5678  
[dws@saintclairllc.com](mailto:dws@saintclairllc.com)  
[saintclairllc.com](http://saintclairllc.com)

## Item 2: Educational Background and Business Experience

**Name:** David W. Sommer

**Born:** 1961

### Education Background and Professional Designations:

#### Education:

BA Business, Kent State University - 1985

MBA Business, Weatherhead School of Management - 1992

#### Designations:

CIMA - Certified Investment Management Analyst

##### CIMA Minimum Qualifications:

- The CIMA certification program requires that candidates meet all eligibility requirements, including experience, education, examination, and ethics.
- Candidates must demonstrate a minimum of three years of client-centered financial services experience and complete five steps to earn the certification: 1. submit application, fee, and pass background check; 2. pass online Qualification Examination; 3. complete education program with Registered Education Provider; 4. pass online Certification Examination; 5. and sign licensing agreement.

#### Business Background:

2019 - Present	Chief Executive Officer & Chief Investment Officer St. Clair Advisors, LLC
2010 - 2018	Chief Investment Officer St. Clair Advisors, LLC
2005 - 2010	Senior Vice President National City/PNC

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

### **Item 4: Other Business Activities**

David W. Sommer is not engaged in any investment-related business or occupation (other than this advisory firm).

### **Item 5: Additional Compensation**

Other than salary, annual bonuses, regular bonuses, David W. Sommer does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through St. Clair Advisors, LLC.

### **Item 6: Supervision**

As an owner and representative of St. Clair Advisors, LLC, David W. Sommer supervises all duties and activities. David W. Sommer's contact information is on the cover page of this disclosure document.