



Ohana Wealth and Life Planning
Form ADV Part 2B
Disclosure Brochure Supplement

Firm CRD number: 162785

March 25, 2024

Item 1 – Cover Page



Jeffrey J. Spitzmiller, CFA
Chief Executive Officer & Chief Investment Officer

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March 25, 2024

This Brochure Supplement provides information about Jeffrey J. Spitzmiller that supplements the Queen City Capital Management, LLC's (QCCM) Group Brochure. You should have received a copy of that brochure. Please contact Jeff Spitzmiller, Chief Compliance Officer, at 513-729-9740 if you did not receive QCCM's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jeffrey J. Spitzmiller is available on the SEC's website at adviserinfo.sec.gov by searching CRD number 4418218.

Item 2 – Educational Background and Business Experience

Jeffrey J. Spitzmiller, CFA
Chief Executive Officer & Chief Investment Officer

Year of Birth: 1971

Education: Miami University, Bachelor's Degree in Business Administration: 1994; Boston University, Master's Degree in Banking and Financial Services: 2007

Business Experience:

- April 2012 to Present: Queen City Capital Management, LLC, Chief Executive Officer & Chief Investment Officer
- June 2007 to April 2012: Brecek and Young Advisors, Inc., Chief Investment Officer
- July 2003 to June 2007: Brecek and Young Advisors, Inc., Chief Investment Strategist

Professional Designations:

CFA®; Chartered Financial Analyst (2000): The CFA charter is a graduate-level professional designation established in 1962 and awarded by CFA Institute. To earn the CFA charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative, and derivative investments, and portfolio management and wealth planning. In addition, CFA charterholders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

RLP®; Registered Life Planner designation from the Kinder Institute of Life Planning (2020): The Registered Life Planner designation is earned upon completion of three courses. After earning the RLP® designation, the Life Planner is expected to keep their skills sharp by attending at least eight hours of continuing education every two years.

Item 3 – Disciplinary Information

We are obligated to disclose any disciplinary event that would be material to you when evaluating Mr. Spitzmiller. We do not have any legal or other disciplinary items to report to you.

Item 4 – Other Business Activities

Please refer to Form ADV Part 2A - *Item 10: Other Financial Industry Activities and Affiliations* for additional information.

Item 5 – Additional Compensation

Mr. Spitzmiller does not receive any compensation or economic benefit from sources outside of QCCM for providing advisory services.

Item 6 – Supervision

Mr. Spitzmiller as Chief Compliance Officer, supervises the advisory activities of our firm. Mr. Spitzmiller is bound by and will adhere to the firm's policies and procedures and Code of Ethics. Clients may contact Mr. Spitzmiller at the phone number on this brochure supplement.