



# **Zachary Paul**

## **Lighthouse Wealth Strategies**

3312 Rosedale Street NW, Suite 201  
Gig Harbor, WA 98335  
(253)948-3723

February 29, 2024

This Brochure Supplement provides information about Zachary Paul that supplements the Lighthouse Wealth Strategies Brochure. You should have received a copy of the Brochure. Please contact Kim Nordi, Chief Compliance Officer, if you did not receive Lighthouse Wealth Strategies' Brochure or if you have any questions about the contents of this supplement.

Additional information about Zachary Paul (CRD# 7605633) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as the CRD number listed above.

## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

### Zachary Paul

Born: August 1999

#### Post-Secondary Education:

- BS, Operations and Supply Chain Management, University of Utah, May 2022
- Series 65, August 2022

- Recent Business Experience:

|  |                    |
|--|--------------------|
| Lighthouse Wealth Strategies, Investment Advisor | 08/2022 to Present |
| Sowell Management Services, Investment Advisor   | 08/2022 to Present |
| Trutoro, Investment Advisor                      | 09/2022 to Present |
| Lighthouse Wealth Strategies, Assistant          | 07/2022 to 08/2022 |
| University of Utah, Student                      | 08/2018 to 05/2022 |
| Alliance Wealth Advisors, Representative         | 09/2021 to 04/2022 |
| Moterra Campervans, Regional Manager             | 03/2021 to 07/2021 |
| Backcountry.com, Sales Representative            | 10/2020 to 03/2021 |
| Bask Enterprises, Assistant                      | 07/2017 to 04/2020 |

## ITEM 3 – DISCIPLINARY INFORMATION

Zachary Paul has no history of any legal or disciplinary events that deems to be material to a client's consideration of Zachary Paul to act as their investment representative. FINRA's BrokerCheck® may have additional information regarding the disciplinary history of Zachary Paul that is not included in this brochure supplement.

(<http://brokercheck.finra.org/Support/TermsAndConditions.aspx>).

## ITEM 4 - OTHER BUSINESS ACTIVITIES

Mr. Zachary Paul has the following Outside Business Activities. He is dual registered with Sowell Management Services and Trutoro. In this role Mr. Paul provides financial services including the transacting of a multitude of financial products for clients. He is also a partial owner of rental property. He spends approximately 5 hours a month in this endeavor during both market and non-market hours managing the rental property. Founding member of Rep Gym Pass LLC, where they transact in gym membership to various gyms. He spends approximately 5 hours a month on this activity.

## ITEM 5 - ADDITIONAL COMPENSATION

Refer to Other Business Activities above

## ITEM 6 - SUPERVISION

Zachary Paul is supervised through a compliance program designed to prevent and detect

violations of the federal and state securities laws. Supervision is conducted by CCO, Kimberly Taurman, who is responsible for administering the policies and procedures. Kim Taurman reviews those policies and procedures annually for their adequacy and the effectiveness of their implementation and ensures that all policies and procedures of the firm are followed. Ms. Taurman may be reached at [compliance@lighthousegh.com](mailto:compliance@lighthousegh.com) or (253) 948-3723.