

**Item 1: Cover Page for Part 2B of Form ADV:  
Brochure Supplement  
January 2016**

**Heidi Marie Wilson**



**Greenleaf & Burleson Wealth Management, LLC  
201 1<sup>st</sup> Street, Suite 204  
Petaluma, CA 94952-4288  
[www.gbwealth.com](http://www.gbwealth.com)**

**Firm Contact:  
James Burleson  
Chief Compliance Officer**

This brochure supplement provides information about Ms. Wilson that supplements our brochure. You should have received a copy of that brochure. Please contact James Burleson, Chief Compliance Officer, if you did not receive our firm's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Wilson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2: Educational Background & Business Experience**

**Heidi Marie Wilson**

**Year of Birth:** 1971

### **Educational Background:**

- 1994; Bachelor of Science in Business Administration from Sonoma State University

### **Business Background:**

- 08/2014 – Present; Greenleaf & Burleson Wealth Management, LLC; Investment Adviser Representative
- 02/2014 – 07/2014; Dino Wilson; Transaction Coordinator
- 10/2008 – 01/2014; Greenleaf & Burleson Wealth Management, LLC; Chief Compliance Officer & Investment Adviser Representative
- 11/2007 – 10/2008; Unemployed
- 07/1994 – 10/2007; State Farm Insurance; Underwriter

### **Exams, Licenses & Other Professional Designations:**

- 12/2010 - Series 65 Exam

## **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to your evaluation of Ms. Wilson.

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

Ms. Wilson is not involved in any other investment-related business or occupation outside of our firm.

## **Item 5: Additional Compensation**

We have nothing to disclose in this regard.

## **Item 6: Supervision**

James Burleson, Chief Compliance Officer of Greenleaf & Burleson Wealth Management, LLC, supervises and monitors Ms. Wilson's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Burleson if you have any questions about Ms. Wilson's brochure supplement at 707-283-0520.

**Item 1: Cover Page for Part 2B of Form ADV:  
Brochure Supplement  
January 2016**

**James David Burleson**



**Greenleaf & Burleson Wealth Management, LLC  
201 1<sup>st</sup> Street, Suite 204  
Petaluma, CA 94952-4288  
[www.gbwealth.com](http://www.gbwealth.com)**

**Firm Contact:  
James Burleson  
Chief Compliance Officer**

This brochure supplement provides information about Mr. Burleson that supplements our brochure. You should have received a copy of that brochure. Please contact James Burleson, Chief Compliance Officer, if you did not receive our firm's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Burleson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2: Educational Background & Business Experience**

**James Burleson**

**Year of Birth:** 1966

### **Educational Background:**

- 1989; Bachelors of Business Administration with an emphasis in Finance from the University of Texas at Austin.

### **Business Background:**

- 05/2004 – Present; Greenleaf & Burleson Wealth Management, LLC; Investment Adviser Representative
- 05/2004 – 01/2006; FSC Securities Corporation; Registered Representative
- 05/2003 – 05/2004; Charles Schwab & Co, Inc.; Investment Specialist

### **Exams, Licenses & Other Professional Designations:**

- 2003 – Series 7 & 66 Exams

## **Item 3: Disciplinary Information**

There are no legal or disciplinary events material to your evaluation of Mr. Burleson.

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

Mr. Burleson serves as California Governor-appointed President of the Sonoma-Marín Fair/4<sup>th</sup> District Agricultural Association Board of Directors. The Sonoma-Marín Fair promotes and showcases agriculture, while displaying the diverse talents, interests and accomplishments of the citizens of California, especially the youth of Sonoma and Marin Counties. This is achieved by providing educational, entertainment and recreational opportunities for the general public, while continually striving towards enhancing the promotion and preservation of California's agricultural heritage.

## **Item 5: Additional Compensation**

We have nothing to disclose in this regard.

## **Item 6: Supervision**

Taylor Greenleaf is a principal of Greenleaf & Burleson Wealth Management, LLC and as such supervises and monitors Mr. Burleson's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact our office if you have any questions about Mr. Burleson's brochure supplement at 707-283-0520.

**Item 1: Cover Page for Part 2B of Form ADV:  
Brochure Supplement  
January 2016**

**Peter Michael Tennyson**



**Greenleaf & Burleson Wealth Management, LLC  
201 1<sup>st</sup> Street, Suite 204  
Petaluma, CA 94952-4288  
[www.gbwealth.com](http://www.gbwealth.com)**

**Firm Contact:  
James Burleson  
Chief Compliance Officer**

This brochure supplement provides information about Mr. Tennyson that supplements our brochure. You should have received a copy of that brochure. Please contact James Burleson, Chief Compliance Officer, if you did not receive our firm's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Tennyson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2: Educational Background & Business Experience**

**Peter Tennyson**

**Year of Birth:** 1984

### **Educational Background:**

- 2011; Bachelors of Arts in Economics from the University of California, Davis

### **Business Background:**

- 03/2012 – Present; Greenleaf & Burleson Wealth Management, LLC; Financial Associate
- 05/2008 – 02/2012; Tennyson Properties; Property Manager
- 09/2007 – 04/2008; Sur La Table; Associate
- 02/2006 – 08/2007; VeriHealth; Administrator Assistant
- 03/2003 – 06/2007; 3BO; Sous Chef

### **Exams, Licenses & Other Professional Designations:**

- 2014 – Series 65 Exam

## **Item 3: Disciplinary Information**

There are no legal or disciplinary events material to your evaluation of Mr. Tennyson.

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

Mr. Tennyson is not involved in any other investment-related business or occupation outside of our firm.

## **Item 5: Additional Compensation**

We have nothing to disclose in this regard.

## **Item 6: Supervision**

James Burleson, Chief Compliance Officer, supervises and monitors Mr. Tennyson's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Burleson if you have any questions about Mr. Tennyson's brochure supplement at 707-283-0520.

**Item 1: Cover Page for Part 2B of Form ADV:  
Brochure Supplement  
January 2016**

**Taylor McClellan Greenleaf**



**Greenleaf & Burleson Wealth Management, LLC  
201 1<sup>st</sup> Street, Suite 204  
Petaluma, CA 94952-4288  
[www.gbwealth.com](http://www.gbwealth.com)**

**Firm Contact:  
James Burleson  
Chief Compliance Officer**

This brochure supplement provides information about Mr. Greenleaf that supplements our brochure. You should have received a copy of that brochure. Please contact James Burleson, Chief Compliance Officer, if you did not receive our firm's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Greenleaf is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2: Educational Background & Business Experience**

**Taylor Greenleaf**  
**Year of Birth:** 1966

### **Educational Background:**

- 1989; Bachelors of Arts in Political Science from Lewis and Clark College

### **Business Background:**

- 05/2004 – Present; Greenleaf & Burleson Wealth Management, LLC; Investment Adviser Representative
- 06/2003 – 01/2006; FSC Securities Corporation; Registered Representative

### **Exams, Licenses & Other Professional Designations:**

- 2000 – Series 7 & 66 Exams

## **Item 3: Disciplinary Information**

There are no legal or disciplinary events material to your evaluation of Mr. Greenleaf.

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

Mr. Greenleaf is not involved in any other investment-related business or occupation outside of our firm.

## **Item 5: Additional Compensation**

We have nothing to disclose in this regard.

## **Item 6: Supervision**

James Burleson, Chief Compliance Officer, supervises and monitors Mr. Greenleaf's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Burleson if you have any questions about Mr. Greenleaf's brochure supplement at 707-283-0520.



**Item 1: Cover Page for Part 2B of Form ADV:  
Brochure Supplement  
January 2016**

**Tiffany Shantel Blaho**



**Greenleaf & Burleson Wealth Management, LLC  
201 1<sup>st</sup> Street, Suite 204  
Petaluma, CA 94952-4288  
[www.gbwealth.com](http://www.gbwealth.com)**

**Firm Contact:  
James Burleson  
Chief Compliance Officer**

This brochure supplement provides information about Ms. Blaho that supplements our brochure. You should have received a copy of that brochure. Please contact James Burleson, Chief Compliance Officer, if you did not receive our firm's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Blaho is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2: Educational Background & Business Experience**

**Tiffany Shantel Blaho**

**Year of Birth:** 1987

### **Educational Background:**

- 2010; Bachelors of Arts in History & Classical Civilization; University of California, Berkley

### **Business Background:**

- 01/2015 – Present; Greenleaf & Burleson Wealth Management, LLC; Financial Associate
- 10/2013 – 12/2014; Murray and Associates; Legal Assistant
- 06/2011 – 10/2013; Treasure Island Event Venue; Event Manager
- 06/2008 – 06/2009; Berkley Student Cooperative; Workshift Manager
- 09/2005 – 02/2010; UHS Tang Center; Medical Records Assistant

### **Exams, Licenses & Other Professional Designations:**

- 2016 – Series 65 Exam

## **Item 3: Disciplinary Information**

There are no legal or disciplinary events material to your evaluation of Ms. Blaho.

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

Ms. Blaho is not involved in any other investment-related business or occupation outside of our firm.

## **Item 5: Additional Compensation**

We have nothing to disclose in this regard.

## **Item 6: Supervision**

James Burleson, Chief Compliance Officer, supervises and monitors Ms. Blaho's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Burleson if you have any questions about Ms. Blaho's brochure supplement at 707-283-0520.

**Item 1: Cover Page for Part 2B of Form ADV:  
Brochure Supplement  
January 2016**

**Bryce Ryan Brown**



**Greenleaf & Burleson Wealth Management, LLC  
201 1<sup>st</sup> Street, Suite 204  
Petaluma, CA 94952-4288  
[www.gbwealth.com](http://www.gbwealth.com)**

**Firm Contact:  
James Burleson  
Chief Compliance Officer**

This brochure supplement provides information about Mr. Brown that supplements our brochure. You should have received a copy of that brochure. Please contact James Burleson, Chief Compliance Officer, if you did not receive our firm's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Brown is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2: Educational Background & Business Experience**

**Bryce Ryan Brown**

**Year of Birth:** 1989

### **Educational Background:**

- 2011; Bachelors of Arts in Political Science; University of California, Berkley

### **Business Background:**

- 09/2013 – Present; Greenleaf & Burleson Wealth Management, LLC; Financial Associate
- 05/2011 – Present; California National Guard
- 11/2012 – 08/2013; Roberts & Ryan Investment, Inc.; Associate
- 06/2011 – 10/2012; Oakland City Auditor's Office; Intern

### **Exams, Licenses & Other Professional Designations:**

- 2012 – Series 7 Exam
- 2012 – Series 63 Exam
- 2016 – Series 65 Exam

## **Item 3: Disciplinary Information**

There are no legal or disciplinary events material to your evaluation of Mr. Brown.

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

Mr. Brown is not involved in any other investment-related business or occupation outside of our firm.

## **Item 5: Additional Compensation**

We have nothing to disclose in this regard.

## **Item 6: Supervision**

James Burleson, Chief Compliance Officer, supervises and monitors Mr. Brown's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Burleson if you have any questions about Mr. Brown's brochure supplement at 707-283-0520.