

# Davis & Wehrle, LLC

Registered Investment Adviser

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## Form ADV Part 2B – Brochure Supplement

*For*

**Kevin T. Davis, Managing Member**

**Mark E. Wehrle, Managing Member**

This brochure supplement provides information about Kevin T. Davis and Mark E. Wehrle that supplements the Davis & Wehrle, LLC brochure. You should have received a copy of that brochure. Please contact Kevin T. Davis, Chief Compliance Officer, if you did not receive Davis & Wehrle, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Kevin T. Davis and Mark E. Wehrle is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) which can be found using the identification numbers 2165928 and 1068579, respectively.

## Item 2: Educational Background and Business Experience

### Kevin T. Davis, RFC

Born: 1964

#### Educational Background

- 1988 – Bachelor of General Studies, Texas Christian University

#### Business Experience

- 09/2007 – Present, Davis & Wehrle, LLC, Managing Member and CCO

#### Professional Designations, Licensing & Exams

##### Registered Financial Consultant (RFC)

**Designation:** Registered Financial Consultant

**Designation Status:** Currently offered and recognized by the issuing organization

**Acronym:** RFC

**Issuing Organization:** International Association of Registered Financial Consultants

**Prerequisites/Experience Required:** Candidate must have a minimum of four years of experience as a full-time practitioner in the field of financial planning or financial services.

**Educational Requirements:** Candidate must hold one of the following to satisfy the education requirement.

- Earned a Bachelor's or advanced degree in Business, Finance, Economics, or a related field.
- Hold one of the following professional designations: AAMS, CFA, CFP, ChFC, CLU, CPA, EA, JD, LUTCF
- Hold a Series 65 securities license or one of the following combinations: Series 6, 63, Series 6 & 66, Series 7 & 63, Series 7 & 66.
- Hold a life insurance license.

**Examination Type:** The educational curriculum must have included an examination process.

**Continuing Education/Experience Requirements:** All members must agree to devote a minimum of 40 hours per year of Professional Continuing Education in the field of personal finance and professional practice management. Four hours every two years must be devoted to ethics.

## **Mark E. Wehrle, ChFC**

Born: 1951

### **Educational Background**

- 1973 – Bachelor of Arts, Economics, Rice University

### **Business Experience**

- 01/2006 – Present, Davis & Wehrle, LLC, Managing Member

### **Professional Designations, Licensing & Exams**

#### **Chartered Financial Consultant (ChFC)**

**Issuing Organization:** The American College

**Prerequisites/Experience Required:** 3 years of full-time business experience within the five years preceding the awarding of the designation.

**Educational Requirements:** 6 core and 2 elective courses.

**Examination Type:** Final proctored exam for each course.

**Continuing Education/Experience Requirements:** 30 hours every 2 years.

## **Item 3: Disciplinary Information**

No management person at Davis & Wehrle, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

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

Kevin T. Davis is not involved with outside business activities.

Mark E. Wehrle is a licensed insurance agent/broker with various companies. The sale of these products accounts for less than 10% of his time.

Mark E. Wehrle may recommend insurance products and may also, as an independent insurance agent, sell those recommended insurance products to clients. When such recommendations or sales are made, a conflict of interest exists as insurance licensed IARs earn insurance commissions for the sale of those products, which may create an incentive to recommend such products. We require that all IARs disclose this conflict of interest when such

recommendations are made. Also, we require IARs to disclose that clients may purchase recommended insurance products from other insurance agents not affiliated with us.

## **Item 5: Additional Compensation**

Kevin T. Davis does not receive any other compensation.

Mark E. Wehrle may receive additional compensation from sales of insurance products. Mark E. Wehrle may be eligible to receive incentive awards (including prizes such as trips or bonuses) for recommending certain types of insurance policies or other investment products that he recommends.

While Mark E. Wehrle endeavors at all times to put the interest of our clients first as part of our fiduciary duty, the possibility of receiving incentive awards creates a conflict of interest, and may affect his judgment when making recommendations. We require that all IARs disclose this conflict of interest when such recommendations are made. Also, we require IARs to disclose that clients may purchase recommended insurance products from other insurance agents not affiliated with us.

## **Item 6: Supervision**

Kevin T. Davis is the Chief Compliance Officer and performs all supervisory duties for the firm.

Mark E. Wehrle is supervised by the Chief Compliance Officer, Kevin T. Davis. Please contact him at (512) 346-1131 with questions regarding supervision.