

Cover Page

CURT DIGIACOMO

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**FORM ADV PART 2
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Curt DiGiacomo that supplements the Goal Line Wealth Management, Inc. brochure. You should have received a copy of that brochure. Please contact Curt DiGiacomo if you did not receive a Goal Line Wealth Management, Inc.'s brochure or if you have questions about this supplement. Mr. DiGiacomo's CRD number is 4532439.

Additional information about Curt DiGiacomo is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience

Curt DiGiacomo
Managing Partner / CCO
Year of Birth: 1963

Business Background:

Goal Line Wealth Management, Inc., Managing Partner / CCO, January 2020 - Present

Wells Fargo Advisors Financial Network, Managing Partner, September 2016 – January 2020

Morgan Stanley, Vice President / Senior Portfolio Manager, June 2009 – September 2016

Citigroup Global Markets Inc., Vice President, June 2002 – June 2009

Educational Background:

University of Arizona, Bachelor of Science in Business Administration, Graduated: 1987

RELEVANT DESIGNATION:

CERTIFIED FINANCIAL PLANNER™ Practitioner (CFP®)

This program is sponsored by the CFP Board of Standards. Before applying for the CFP® Certification Examination, you need to meet the six course education requirements (or their equivalent) as set by CFP Board as well as a financial plan development course registered with CFP Board. Additionally, a bachelor's degree (or higher), or its equivalent, in any discipline, from an accredited college or university is required to attain CFP® certification. Additional requirements include successful completion of the CFP® Certification Examination, which tests your ability to apply your financial planning knowledge to client situations. The 10-hour exam is divided into three separate sessions. Because of the integrated nature of financial planning, however, each session may cover all topic areas (personal financial planning, risk management, income taxes, investments, retirement planning, and estate planning). In addition to the education requirements, there is an experience requirement, which is currently at least three years of qualifying full-time work experience in personal financial planning. There are additional requirements for candidates and registrants to pass Fitness Standards and a Background Check and to agree to abide by CFP Board's *Code of Ethics and Professional Responsibility*, *Rules of Conduct* and *Financial Planning Practice Standards*. Certificants must continue to meet continuing education requirements which presently include obtaining 30 hours of continuing education in selected subjects every two calendar years, including a two-hour CFP Ethics course. For more details, see www.cfp.net.

CERTIFIED INVESTMENT MANAGEMENT ANALYST (CIMA®)

CIMA designees have met initial and on-going experience, ethical, education and examination requirements for investment management consulting, including advanced investment management theory and application. Prerequisites for the CIMA certification are three years of financial services experience and an acceptable regulatory history. Candidates must pass an online Qualification Examination, successfully complete a one-week classroom education program, and pass an online Certificate Examination. They must also adhere to IMCA's Code of Professional Responsibility, and maintain continuing education.

CERTIFIED PRIVATE WEALTH ADVISOR® (CPWA®)

The CPWA designation signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for the professional designation, which is centered on private wealth management topics and strategies for high-net-worth clients. Prerequisites for the CPWA designation are: a Bachelor's degree from an accredited college or university or one of the following designations or licenses: CIMA®, CIMC®, CFA®, CFP®, ChFC®, or CPA license; have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements and five years of experience in financial services or delivering services to high-net-worth clients. CPWA designees have completed a rigorous educational process that includes executive education requirements and successful completion of a comprehensive examination. CPWA designees are required to adhere to the Investments & Wealth Institute *Code of Professional Responsibility* and *Rules and Guidelines for Use of the Marks*. CPWA designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through the Investments & Wealth Institute.

Form ADV, Part 2B, Item 3

Disciplinary Information

Mr. DiGiacomo does not have any reportable disciplinary disclosures.

Form ADV, Part 2B, Item 4

Other Business Activities

Curt DiGiacomo has a financial industry affiliated business as an independent insurance agent. Not more than 30% of his time is spent on this activity. From time to time, he offers clients advice or products from this activity. He may receive separate yet typical compensation in the form of commissions for the sale of insurance products.

This practice represents a conflict of interest because it gives Mr. DiGiacomo an incentive to recommend products based on the commission amount received. This conflict is mitigated by the fact that Mr. DiGiacomo has a fiduciary responsibility to place the best interest of the client first and the clients are not required to purchase any products. Clients have the option to purchase these products through another insurance agent of their choosing.

Form ADV, Part 2B, Item 5

Additional Compensation

Curt DiGiacomo does not receive any economic benefit from anyone, who is not a client, for providing advisory services.

Form ADV, Part 2B, Item 6

Supervision

Goal Line Wealth Management, Inc. has written supervisory procedures in place that are reasonably designed to detect and prevent violations of securities laws, rules, and regulations of the California Securities Act. Mr. DiGiacomo is Goal Line Wealth Management, Inc.'s Chief Compliance Officer and the sole Investment Advisory Representative ("IAR") of the firm, therefore he is responsible for all of the activities that occur on behalf of Goal Line Wealth Management, Inc. and its clients. He can be reached at (858) 457-0606.

Form ADV, Part 2B, Item 7

Requirements for State-Registered Advisers

Curt DiGiacomo does not have any reportable disciplinary events required to be disclosed in this section. There are not any reportable bankruptcy petitions or other events to report, including the following:

1. An award or otherwise being *found* liable in an arbitration claim alleging damages in excess of \$2,500, *involving* any of the following:
 - (a) an investment or an investment-related business or activity;
 - (b) fraud, false statement(s), or omissions;
 - (c) theft, embezzlement, or other wrongful taking of property;
 - (d) bribery, forgery, counterfeiting, or extortion; or
 - (e) dishonest, unfair, or unethical practices.
2. An award or otherwise being *found* liable in a civil, *self-regulatory organization*, or administrative *proceeding involving* any of the following:
 - (a) an investment or an *investment-related* business or activity;
 - (b) fraud, false statement(s), or omissions;
 - (c) theft, embezzlement, or other wrongful taking of property;
 - (d) bribery, forgery, counterfeiting, or extortion; or
 - (e) dishonest, unfair, or unethical practices.