

# Corinthian Wealth Management, LLC

David Samuels  
1625 The Alameda, Suite 308  
San Jose, California, 95126  
408-995-0915

December 25, 2020

The Brochure Supplement provides information about David Samuels (CRD# 2142428) that supplements the Corinthian Wealth Management, LLC brochure. You should have received a copy of the Corinthian Wealth Management Brochure. Please contact our Chief Compliance Officer by email at [info@corinthianwealth.com](mailto:info@corinthianwealth.com) or phone 408-995-0915. If you did not receive the Corinthian Wealth Management Brochure or if you have any questions about the contents of this supplement.

Additional information about David Samuels (CRD# 2142428) 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

### David Samuels

Born: 1953

#### Post-Secondary Education:

- BA Music, California State University Northridge, 1975
- Certified Financial Planner™ (CFP®): To be a CFP®, one must:
  - Hold a bachelor's degree from an accredited college or university
  - Complete financial planning education requirements set by the CFP Board ([www.cfp.net](http://www.cfp.net))
  - Successfully complete the 10-hour CFP® certification exam
  - Obtain 3 years of qualifying full-time work experience
  - Successfully pass the Candidate Fitness Standards and background check
  - Complete 30 hours of continuing education every 2 years
- Chartered Life Underwriter (CLU): To be a CLU, one must:
  - Have 3 years of full-time business experience within 5 years preceding receipt of the designation
  - Successfully complete 5 core and 3 elective courses
  - Successfully complete the final proctored exam for each course
  - Complete 30 hours of continuing education every 2 years

#### Recent Business Experience:

Investment Advisor, Corinthian Wealth Management, LLC:	01/2021 to Present
Investment Advisor, Arbor Point Advisors, LLC:	11/2020 to 01/2021
Investment Advisor, KMS Financial Services, Inc:	04/2013 to 11/2020
Investment Advisor, Sowell Management Services LLC:	09/2016 to 12/2017
Investment Advisor, Concert Wealth Management, LLC:	06/2010 to 06/2017

## ITEM 3 - DISCIPLINARY INFORMATION

Additional information regarding Mr. Samuels legal or disciplinary events that are material to a client's or prospective client is available at (<http://brokercheck.finra.org>)

## ITEM 4 - OTHER BUSINESS ACTIVITIES

Mr. Samuels does not have any reportable Outside Business Activities.

## ITEM 5 - ADDITIONAL COMPENSATION

Other than standard compensation from investment advisory accounts and as disclosed above, Mr. Samuels does not receive any compensation or economic benefit from any other person, company or organization in exchange for providing clients investment advisory services through Corinthian Wealth Management, LLC

## ITEM 6 - SUPERVISION

As a supervised person, David Samuels' activities are supervised and monitored by Devin MacKie,

the Chief Compliance Officer of Corinthian Wealth Management, LLC. His duties include monitoring communications with clients, review of client account activity, review and approval of new client agreements, training and guidance on appropriate advice and recommendations provided to clients. Additionally, as CCO Mr. MacKie will supervise the compliance program designed to prevent and detect violations of the federal and state securities laws by annually reviewing and updating of the firm's policies and procedures.