

**BROCHURE SUPPLEMENT**  
**ITEM 1: COVER SHEET**

**D. Rex Rousselot**

**DWR Wealth Management, LLC**

1884 The Alameda  
San Jose, CA 95126  
(408) 260-3058

June 22, 2021

This Brochure Supplement provides information about D. Rex Rousselot that supplements the DWR Wealth Management, LLC Brochure. You should have received a copy of that Brochure. Please contact D. Rex Rousselot, Managing Member at (408) 260-3058 or [rex@dunhamcpas.com](mailto:rex@dunhamcpas.com) if you did not receive DWR Wealth Management, LLC's Brochure or if you have any questions about the content of this supplement.

Additional information about D. Rex Rousselot is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Mr. Rousselot's CRD number is 2594478.

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**ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

D. Rex Rousselot was born in 1956. He received a BSBA in Finance from University of Denver in 1978.

**Employment Background**

Employment Dates: 1/2005 - Present  
Firm Name: DWR Wealth Management, LLC  
Type of Business: Investment Advisor  
Job Title: Managing Member

Employment Dates: 1/2001 – 12/2010  
Firm Name: DRR Capital Management  
Type of Business: Investment Advisor  
Job Title: Managing Director.

## Professional Designations

Chartered Financial Consultant (ChFC) – 2002  
Certified Financial Planner (CFP) - 2018

The Chartered Financial Consultant (“ChFC”) designation is issued by The American College. The prerequisites include: 1) 3 years of full-time business experience within the five years preceding the awarding of the designation; 2) completing 6 core and 2 elective courses; and 3) passing a final proctored exam for each course. Each individual must complete 30 continuing education credits every 2 years.

The CFP designation is issued by the Certified Financial Planner Board of Standards, Inc. In order to receive a CFP designation, the candidate must have a bachelor’s degree or higher from an accredited college or university and have 3 years of full-time personal financial planning experience. In addition, the candidate must complete a CFP board-registered program or hold one of the following: CPA, ChFC, Chartered Life Underwriter(CLU), CFA, Ph.D. in business or economics, Doctor of Business Administration or attorney’s license. Once the designation is earned, the CFP must complete 30 hours of continuing education every 2 years.

## ITEM 3: DISCIPLINARY INFORMATION

Registered investment advisors are required to disclose any material facts regarding any legal or disciplinary actions that would be material to your evaluation of each investment advisor representative providing investment advice to you. There is no information of this type to report.

## ITEM 4: OTHER BUSINESS ACTIVITIES

Mr. Rousselot is not involved in any other business activities.

## ITEM 5: ADDITIONAL COMPENSATION

Mr. Rousselot does not receive any economic benefit from any non-client for providing advisory services.

## ITEM 6: SUPERVISION

Mr. Rousselot, Managing Member, is responsible for overseeing all investment personnel on our behalf. His telephone number is (408) 260-3058.