



## Part 2B of Form ADV: Brochure Supplement

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This brochure supplement provides information about John Wanvig that supplements the White Lighthouse Investment Management ADV brochure. You should have received a copy of that brochure. Please contact John Wanvig at +41 79 952 5182 if you did not receive White Lighthouse Investment Management's ADV brochure or if you have any questions about the contents of this supplement.

Additional information about John Wanvig and White Lighthouse Investment Management is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Education Background and Business Experience**

John Wanvig – Born 1961

### **Business Experience:**

Financial Planner – Investment Advisor: White Lighthouse Investment Management.  
Lausanne, Switzerland 2016 – present

Vice President, Regional Director – General Mills Inc. (CPW: Cereal Partners Worldwide)  
Lausanne, Switzerland 1988 – 2015

Analyst – Prudential-Bache Securities: New York, New York, USA 1984 – 1986

### **Education:**

MBA – Harvard University – Harvard Business School 1988

BA – Economics – Cornell University 1984

Certificate in Financial Planning – Kaplan University 2016

John Wanvig is a Certified Financial Planner with White Lighthouse Investment Management S.A.R.L. The Certified Financial Planner™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 88,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

**Education** – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services and attain a

bachelor's degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;

**Examination** – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;

**Experience** – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and

**Ethics** – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

**Continuing Education** – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field;

**Ethics** – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require the CFP® professionals provide financial planning services at a fiduciary planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Disciplinary Action**

There have been no disciplinary events against John Wanvig.

### **Other Business Activities**

John Wanvig is an advisor-mentor in the start-up ecosystem of EPFL University in Lausanne. He has advised several start-up companies over the last several years including

Future Instruments, Qloud Lab, and Morphodyne. John may continue to be involved in the EPFL ecosystem and may work with other start-ups in the future.

John Wanvig is also an advisor-mentor in the PROCAT ecosystem of Professional Catalans in Switzerland. He has advised several entrepreneurs since 2019 and plans to continue, as a mentor, to help them grow their business ideas. He may be involved with others in the future.

### **Additional Compensation**

No additional compensation is received. Compensation is only received directly from clients.

### **Supervision**

As an employee of White Lighthouse Investment Management, John is responsible for serving his clients and abides by the firm's Code of Conduct, which is the CFP Board's Standards of Professional Conduct. He is monitored by the Chief Compliance officer and supervised by Jonathan Lachowitz, the firm's owner.

John Wanvig abides by the firm's code of ethics which is also inclusive of the CFP Board's code of ethics.

### **Requirements for State Registered Advisors**

John Wanvig has never been found liable in any arbitration claim alleging damages in excess of \$2500 (or any amount) involving: investments, investment related activities, fraud, false statements, omissions, theft, embezzlement, wrongfully taking property, bribery, forgery, counterfeiting, extortion or dishonest, unfair or unethical practices or for any other matter.

John Wanvig has never been found liable in any civil, self-regulatory organization of administrative proceeding involving: investments, investment related activities, fraud, false statements, omissions, theft, embezzlement, wrongfully taking property, bribery, forgery, counterfeiting, extortion or dishonest, unfair or unethical practices or for any other matter.

John Wanvig has never been the subject of a bankruptcy petition.