



Investment Adviser Representative

David Taucher, CFP®

Personal CRD Number: 1297622

Pistone Wealth Advisors
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04/03/2020 Updated

Principal Office:
25825 Science Park Drive, Suite 110
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This brochure supplement provides information about David Taucher an investment adviser representative herein referred to as "Your Adviser" that supplements the Beacon Financial Advisory LLC Form ADV 2A, which you should have already received.

Please contact Beacon Financial Advisory LLC at 216-910-1850, if you did not receive the Investment Advisory Disclosure Brochures for the above listed registered investment advisers or if you have any questions about the contents.

Additional information about David Taucher is available via the U.S. Securities and Exchange Commission's website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Professional Designations:

Education:

David Taucher has not received any higher education degrees after high school.

Business Experience:

04/2020 - Present	Investment Adviser Representative Beacon Financial Advisory LLC
12/2019 – 03/2020	Unemployed David Taucher
04/2019 - 12/2019	Senior Portfolio Manager Dakota Wealth, LLC
10/2016 - 04/2019	Portfolio Strategist Sequoia Financial Group
01/1995 - 09/2016	Chief Investment Officer RAV Financial Services, LLC

Designations:

CFP® - Certified Financial Planner

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 a number of 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.

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 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 and 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:

- i. 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; and
- ii. Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial 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 Information:

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Other Business Activities:

David Taucher is not engaged in any investment-related business or occupation (other than this advisory firm).

Additional Compensation:

David Taucher does not receive any economic benefit from any person, company, or organization, other than Beacon Financial Advisory LLC in exchange for providing clients advisory services through Beacon Financial Advisory LLC. Please refer to the Fees and Compensation section in the registered investment adviser's Investment Advisory Disclosure Brochure (Form ADV2A) which should have been provided to you by your Financial Adviser. The Fees and Compensation section describes in detail the potential other forms of compensation received by your adviser such as brokerage or insurance commissions, due diligence, seminars, sales, incentives, loans, or advances.

Supervision:

As a representative of Beacon Financial Advisory LLC, David Taucher is supervised by Deborah George, the firm's Chief Compliance Officer. Deborah George is responsible for ensuring that David Taucher adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Deborah George is (216) 910-1850.