

Item 1 - Cover Sheet

## BROCHURE SUPPLEMENT

Tracy L. Newquist

DWR Wealth Management, LLC

1884 The Alameda  
San Jose, CA 95126  
(408) 260-9600 x314

February 3, 2022

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 Tracy Newquist is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Ms. Newquist's CRD number is 4338710.

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### Item 2 - Educational Background and Business Experience

Tracy L. Newquist was born in 1967. She received a BS in Business Administration, Marketing from California State University, Chico in 1994.

#### Employment Background

Employment Dates: 5/2021 - Present  
Firm Name: DWR Wealth Management, LLC  
Type of Business: Investment Advisor  
Job Title: Managing Member/Investment Adviser Representative

Employment Dates: 9/2020 – 4/2021  
Firm Name: Self Employed  
Type of Business: Business Development/Practice Management  
Job Title: Owner, Consultant

Employment Dates: 6/2020 – 8/2020  
Firm Name: Buckingham Strategic Wealth  
Type of Business: Investment Advisor  
Job Title: Business Transition Support

#### Employment Background (continued)

Employment Dates: 12/2016 – 3/2020  
Firm Name: Securities America  
Type of Business: Broker Dealer  
Job Title: Registered Representative

Employment Dates: 1/2006 – 5/2020  
Firm Name: RNP Advisory Services, Inc.  
Type of Business: Investment Advisor  
Job Title: Investment Advisor Representative, Owner, President, CCO

Employment Dates: 1/2005 – 5/2020  
Firm Name: RNP Real Estate and Insurance Services, Inc.  
Type of Business: Insurance  
Job Title: Owner/Agent

Employment Dates: 12/2008 – 12/2016  
Firm Name: Foothill Securities  
Type of Business: Broker Dealer  
Job Title: Registered Representative

Employment Dates: 1/2003 – 8/2016  
Firm Name: Downtown Professional Building, LLC  
Type of Business: Real Estate  
Job Title: Member/Managing Partner

#### 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

Ms. Newquist is not involved in any other business activities.

#### Item 5 - Additional Compensation

Ms. Newquist does not receive any economic benefit from any non-client for providing advisory services.

#### Item 6 - Supervision

Mr. Rousselot, Managing Member, is responsible for the supervision of Ms. Newquist. His telephone number is (408) 260-3058.