



Part 2B of Form ADV: *Firm Brochure Supplement*

Zimmerman Wealth Management, LLC

500 Davis Street, Suite 1005, Evanston, IL 60201

Telephone: 847-556-3200

Email: thz@zimmermanwealth.com

Web Address: www.zimmermanwealth.com

March 23, 2023

This brochure supplement provides information about Thomas Zimmerman that supplements the brochure of Zimmerman Wealth Management, LLC. You should have received a copy of that brochure. Please contact Thomas Zimmerman at 847-556-3200 or thz@zimmermanwealth.com if you did not receive the brochure of Zimmerman Wealth Management, LLC or if you have any questions about the contents of this brochure supplement.

Item 2 Educational Background and Business Experience

Thomas Zimmerman (b. 1955)
Zimmerman Wealth Management, LLC
2003 – Present: Founder, Managing Member and Chief Compliance Officer

Macalester College – Bachelor of Arts

Mr. Zimmerman holds the CERTIFIED FINANCIAL PLANNER™ certification.

The CERTIFIED FINANCIAL PLANNER™ certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CERTIFIED FINANCIAL PLANNER™ 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 CERTIFIED FINANCIAL PLANNER™ certificate, an individual must satisfactorily fulfill specific education, examination, experience, ethics and continuing education requirements.

Item 3 Disciplinary Information

There is no disciplinary information to report.

Item 4 Other Business Activities

There are no other business activities to report.

Item 5 Additional Compensation

There is no additional compensation to report.

Item 6 Supervision

Mr. Zimmerman, as Founder, Managing Member and Chief Compliance Officer of the firm, has responsibility for firm-wide management and does not fall under the supervision of any individual. If you have any questions, please direct them to Thomas Zimmerman at the address and telephone number provided on the cover page of this brochure supplement.



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This brochure supplement provides information about Mona Edwards that supplements the brochure of Zimmerman Wealth Management, LLC. You should have received a copy of that brochure. Please contact Thomas Zimmerman at 847-556-3200 or thz@zimmermanwealth.com if you did not receive the brochure of Zimmerman Wealth Management, LLC or if you have any questions about the contents of this brochure supplement.

Item 2 Educational Background and Business Experience

Mona Edwards (b. 1961)
Zimmerman Wealth Management, LLC
2014 – Present: Director of Financial Planning
2007 – 2014: Financial Planner

Louisiana State University – Bachelor of Arts

Ms. Edwards holds the CERTIFIED FINANCIAL PLANNER™ certification.

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Item 3 Disciplinary Information

There is no disciplinary information to report.

Item 4 Other Business Activities

There are no other business activities to report.

Item 5 Additional Compensation

There is no additional compensation to report.

Item 6 Supervision

Thomas Zimmerman, Founder, Managing Member and Chief Compliance Officer of the Firm, is responsible for the oversight of Ms. Edwards' advisory activities. Mr. Zimmerman may be contacted at the address and telephone number provided on the cover page of this brochure supplement.



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This brochure supplement provides information about Marshall Garrett that supplements the brochure of Zimmerman Wealth Management, LLC. You should have received a copy of that brochure. Please contact Thomas Zimmerman at 847-556-3200 or thz@zimmermanwealth.com if you did not receive the brochure of Zimmerman Wealth Management, LLC or if you have any questions about the contents of this brochure supplement.

Item 2 Educational Background and Business Experience

Marshall Garrett (b. 1987)
Zimmerman Wealth Management, LLC
2021 - Present: Fiduciary Wealth Advisor

2016 – 2021: Financial Planning Associate
2013 – 2016: Client Service Associate

Texas Tech University – MBA, MS Personal Financial Planning

St. Edward's University – BBA, Economics

Mr. Garrett holds the CERTIFIED FINANCIAL PLANNER™ certification.

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Item 3 Disciplinary Information

There is no disciplinary information to report.

Item 4 Other Business Activities

There are no other business activities to report.

Item 5 Additional Compensation

There is no additional compensation to report.

Item 6 Supervision

Thomas Zimmerman, Founder, Managing Member and Chief Compliance Officer of the Firm, is responsible for the oversight of Mr. Garrett's advisory activities. Mr. Zimmerman may be contacted at the address and telephone number provided on the cover page of this brochure supplement.



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This brochure supplement provides information about Daniel James Wood that supplements the brochure of Zimmerman Wealth Management, LLC. You should have received a copy of that brochure. Please contact Thomas Zimmerman at 847-556-3200 or thz@zimmermanwealth.com if you did not receive the brochure of Zimmerman Wealth Management, LLC or if you have any questions about the contents of this brochure supplement.

Item 2 Educational Background and Business Experience

Daniel James Wood (b. 1989)
Zimmerman Wealth Management, LLC

2021 – Present: Fiduciary Wealth Advisor

2018 – 2021: Financial Planning Associate

State Farm – Next Door Chicago
2015 – 2018: Financial Coach

Morningstar Inc.
2013 – 2015: Associate Equity Analyst
2012 – 2013: Data Analyst – Separately Managed Accounts

Bradley University – BA, Finance

Mr. Wood holds the Chartered Financial Analyst (CFA) designation.

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute — the largest global association of investment professionals.

There are currently more than 138,000 CFA charterholders working in 134 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Mr. Wood holds the CERTIFIED FINANCIAL PLANNER™ certification.

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Item 3 Disciplinary Information

There is no disciplinary information to report.

Item 4 Other Business Activities

There are no other business activities to report.

Item 5 Additional Compensation

There is no additional compensation to report.

Item 6 Supervision

Thomas Zimmerman, Founder, Managing Member and Chief Compliance Officer of the Firm, is responsible for the oversight of Mr. Wood's advisory activities. Mr. Zimmerman may be contacted at the address and telephone number provided on the cover page of this brochure supplement.