

Ohana Wealth and Life Planning
Form ADV Part 2B
Disclosure Brochure Supplement

CRD number: 162785

January 9, 2023

Item 1 – Cover Page



Jeffrey J. Spitzmiller, CFA
Chief Executive Officer & Chief Investment Officer

212 East Third Street, Suite 100

Cincinnati, OH 45202

Telephone: 513.721.6089

Online: www.queencitycapitalmanagement.com

January 9, 2023

This Brochure Supplement provides information about Jeffrey J. Spitzmiller that supplements the Queen City Capital Management, LLC's (QCCM) Group Brochure. You should have received a copy of that brochure. Please contact Roseann Higgins, Chief Compliance Officer, at 513-278-3639, or at RHiggins@keybridgecompliance.com or if you did not receive QCCM's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jeffrey J. Spitzmiller is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Jeffrey J. Spitzmiller, CFA
Chief Executive Officer & Chief Investment Officer

Year of Birth: 1971

Education: Miami University, Bachelor's Degree in Business Administration: 1994; Boston University, Master's Degree in Banking and Financial Services: 2007

Business Experience:

- April 2012 to Present: Queen City Capital Management, LLC, Chief Executive Officer & Chief Investment Officer
- June 2007 to April 2012: Brecek and Young Advisors, Inc., Chief Investment Officer
- July 2003 to June 2007: Brecek and Young Advisors, Inc., Chief Investment Strategist

Professional Designations:

CFA®; Chartered Financial Analyst (2000)

RLP®; Registered Life Planner designation from the Kinder Institute of Life Planning (2020)

Item 3 – Disciplinary Information

We are obligated to disclose any disciplinary event that would be material to you when evaluating Mr. Spitzmiller. We do not have any legal or other disciplinary items to report to you.

Item 4 – Other Business Activities

Please refer to Form ADV Part 2A - *Item 10: Other Financial Industry Activities and Affiliations* for additional information.

Item 5 – Additional Compensation

Mr. Spitzmiller does not receive any compensation or economic benefit from sources outside of QCCM for providing advisory services.

Item 6 – Supervision

Chief Compliance Officer, Roseann Higgins, generally supervises Mr. Spitzmiller by reviewing the processes and controls in place for the discretionary investment management responsibilities

that he executes for clients. Ms. Higgins can be reached by telephone or by email at RHiggins@keybridgecompliance.com.

Explanation of Designations

The Chartered Financial Analyst® (CFA) designation is a professional certification issued by the CFA Institute to qualified financial analysts who: (i) have a bachelor's degree and four years of qualified investment work experience [full time, but not necessarily investment related]; (ii) complete a self-study program (250 hours of study for each of the three levels); (iii) successfully complete a series of three six-hour exams; and (iv) pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Chartered Financial Analyst (CFA)

The Chartered Financial Analyst (CFA) designation is issued by the CFA Institute, formerly known as the Association for Investment Management and Research (AIMR). The CFA Program is a graduate-level program for investment specialists such as securities analysts, money manager, and investment advisers. To become a CFA charterholder, an individual must have at least four years of acceptable professional experience in the investment decision-making process, must pass three sequential, six-hour examinations. Each of the 3 course level exams must be passed and each course level is a self-study program involving approximately 250 hours of study time. There are no continuing education requirements to maintain the CFA designation. CFA charterholders must commit to abide by and annually reaffirm adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

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 90,000 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.

High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders—often making the charter a prerequisite for employment.

Additionally, regulatory bodies in 22 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession. To learn more about the CFA charter, visit www.cfainstitute.org.