

Item 1 - Cover Sheet

BROCHURE SUPPLEMENT

Tracy L. Newquist

DWR Wealth Management, LLC

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

December 4, 2023

This Brochure Supplement provides information about Tracy L. Newquist 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 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. Ms. Newquist's CRD number is 4338710.

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: 1/2006 – 5/2020
Firm Name: RNP 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.