

Part 2B of Form ADV: *Brochure Supplement*

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This brochure supplement provides information about David Lee Kopp that supplements the Spire Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Sue McKeown 703-657-6060 if you did not receive Spire Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about David Lee Kopp is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: David Lee Kopp **Born:** 1968

Education

- University of South Florida; Bachelors, Finance; 1997

Business Experience

- LPL Financial; Wealth Manager; from Nov 2018 to June 2023
- Wells Fargo Financial ; Wealth Manager; from Sept 2010 to Nov 2018
- Morgan Stanley; Financial Advisor; from Oct 3005 to Sept 2010

Item 3 Disciplinary Information

David Lee Kopp has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

1. David Lee Kopp is also engaged in the following investment-related activities:

Registered representative of a broker-dealer

Advisor also carries the securities license required by FINRA (Financial Industry Regulatory Authority) in order to offer securities products and execute securities transactions in addition to their registration as an Investment Advisor representative providing investment advice. This additional licensing allows our advisors a much more robust suite of products to offer to their clients. Registration, supervision and continuing education are all requirements for maintaining this type of registration.

Conflicts of holding this type of license could be in cross-selling. Selling out of an advisory account and buying in a securities account and thereby generating a commission for the representative. Moving monies from an advisory account into a commission account in order to affect a commissionable trade.

Accounts and trades are reviewed for these types of activities. A Source of Funds document is required on many of these types of direct investments to monitor for trade and money movement between advisory and securities accounts.

The types of commissions that may be earned on these types of accounts/products could be any one of the following:

1. Mutual Fund 12b-1 commissions
2. Mutual Funds Trail Commissions

3. Direct Product Sponsor Commissions

Licensed as an insurance representative allows the advisor to offer various insurance products such as Variable Annuities, Life Insurance, Long Term Care insurance. Typically these products generate commission payments to the representatives selling the products. The ability to offer these products to clients allows the advisor a much more robust suite of products and thereby providing the client with a much more comprehensive financial plan

2. David Lee Kopp receives commissions, bonuses or other compensation on the sale of securities or other investment products.

Holding these additional licenses and allowing the advisor the ability to offer securities products and insurance products in addition to their investment advice, may create a conflict of interest if the advisor is recommending these products in order to generate commissions rather than looking out for the best interests of the client. Each of these purchases is reviewed and approved by a principal of the firm. In addition, many of these products come with additional disclosures so that the client can fully understand the product.

B. Non Investment-Related Activities

David Lee Kopp is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his or her time.

Item 5 Additional Compensation

David Lee Kopp does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6 Supervision

Supervisor: Andrew Baron

Title: Supervising Principal

Phone Number: 703-657-6072

Daily trade reviews

Monthly review of personal securities accounts

Monthly correspondence reviews – including ongoing capture and review of email

Periodic reviews of client account activity