

Form ADV Part 2B: Brochure Supplement



WFA of San Diego, LLC

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This brochure provides information about principals and adviser representatives (David Harris, David P. White, and Andrew M. Jensen) of WFA of San Diego, LLC and this brochure supplements the WFA of San Diego, LLC's brochure. You should have received a copy of that brochure. Please contact David P. White at 619-491-0225, or by email at david@wfasandiego.com if you did not receive WFA of San Diego's brochure or if you have any questions about the contents of this supplement. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission, or by any state securities authority. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission, or by any state securities authority.

WFA of San Diego may refer to itself as a "registered investment adviser". Clients should be aware that registration with the SEC or any state securities authority does not imply a certain level of skill or training. Additional information about WFA of San Diego (CRD# 307404) is available on the SEC's website at www.adviserinfo.sec.gov

Additional information about David Harris, David P. White and Andrew M. Jensen, and is available on the SEC's website at www.adviserinfo.sec.gov.

BROCHURE SUPPLEMENT

EDUCATION AND BUSINESS STANDARDS

WFA SD may require that advisors have a bachelor's degree and/or further coursework demonstrating knowledge of financial planning. Additionally, advisors must have work experience that demonstrates their aptitude for financial planning and investment management.

PROFESSIONAL CERTIFICATIONS

Employees have earned certifications and credentials that are required to be explained in further detail.

CFP®: A Certified Financial Planner® designation is offered by the Certified Financial Planner Board of Standards, Inc. (CFP Board) to candidates with at least a bachelor's degree and three years of full-time pertinent experience and that complete a CFP-board registered program or hold certain designations, including a CFA. CFP professionals must agree to be bound by the CFP Board's Standards of Professional Conduct and complete 30 hours of continuing education every two years.

CFA®: The Chartered Financial Analyst designation is a graduate-level investment credential awarded by the CFA Institute. Successful candidates must have a bachelor's degree from an accredited institution or equivalent educational or work experience, pass three sequential six-hour uniform examinations that demonstrate advanced skills necessary for investment analysis and decision making, and agree to abide by the CFA Institute's Code of Ethics and Standards of Professional Conduct.

CAIA®: This designation is issued by the Chartered Alternative Investment Analyst Association ("CAIA"). Successful candidates must have either a bachelor's or equivalent degree and more than one year of business experience in the financial industry, or four years of experience in the financial industry. The candidate is required to take a self-study certification program which requires the successful completion of both the Level I and Level II examinations. These examinations cover: Professional Standards and Ethics, Alternative Investments, Real Assets including Commodities, Hedge Funds, Private Equity, Structured Products, Ethics, Regulation, and ESG, Models, Institutional Asset Owners and Investment Policies, Risk and Risk Management, Due Diligence and Selecting Strategies, and Volatility and Complex Strategies.

David P. White

Date of Birth: December 31, 1958

Education:

- 1981 – Bachelor of Science in Finance, University of Arizona

Item 2-Business Background:

- 1994 to 2004, Registered Representative, Financial West Group
- 1994 to 2011, Principal of David White Investment Counsel
- 2011 to Present, Senior Vice President and Investment Committee Member, WFA Wealth Managers
- 2020 to Present, Senior Vice President and Investment Committee Member, WFA San Diego, LLC

Item 3-Disciplinary Activity: None

Item 4-Other Business Activities: None

Item 5-Additional Compensation: Mr. White does not receive any additional compensation from non-Clients for providing advisory services.

Item 6-Supervision:

David P. White is supervised by Louis Dworsky, the Owner of WFA SD. He reviews David White's work through remote interactions and in-person office visits. He also reviews Mr. White's activities through our Client relationship management system. In addition, WFA SD has implemented a compliance program including written compliance policies and procedures and a Code of Ethics that governs the activities of WFA SD personnel. A copy of the Code of Ethics is available on request.

Supervisors contact information:

Louis Dworsky

Phone: 919-606-3100

Email: compliance@wfasandiego.com

Andrew Marshall Jensen

Date of Birth: June 25, 1979

Education:

- 2002 – Bachelor of Arts (English), Loyola Marymount University

Item 2-Business Background:

- 2009 to 2014, Self Employed, Independent Placement Agent
- 2014 to 2020, Registered Representative, Crystal Capital Partners
- 2021 to Present, Senior Wealth Advisor, WFA San Diego, LLC & WFA Wealth Managers

Item 3-Disciplinary Activity: None

Item 4-Other Business Activities: None

Item 5-Additional Compensation: Mr. Jensen does not receive any additional compensation from non-Clients for providing advisory services.

Item 6-Supervision:

Andrew Jensen is supervised by David P. White, Chief Compliance Officer. He reviews Andrew Jensen's work through remote interactions and in-person office visits. He also reviews Mr. Jensen's activities through our Client relationship management system. In addition, WFA SD has implemented a compliance program including written compliance policies and procedures and a Code of Ethics that governs the activities of WFA SD personnel. A copy of the Code of Ethics is available on request.

Supervisor's contact information: David P. White

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