

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

David John Levorchick  
212 East Court Street, #101  
Sidney, OH 45365  
937-216-1744

DBA: Levorchick Wealth Management

Spire Wealth Management, LLC  
7901 Jones Branch Dr., #810

McLean, VA 22102

April 2023

This brochure supplement provides information about David John Levorchick 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 John Levorchick is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

**Full Legal Name:** David John Levorchick      **Born:** 1982

### Education

- Wright State University; BS, Business/Financial Services; 2005

### Business Experience

- E.K. Riley Investments; Investment Advisor; from 12/2014 to 08/2020
- U. S. Bancorp; Investment Advisor; from 2007 to 2014
- NatCity Investments; Representative; from 2005 to 2007

### Practice Management

Portfolios are constructed for my clients based on, daily research, economic indicators and conversations with portfolio managers. Given each client has their own unique situation and goals, the variants of their portfolios may differ to support this.

- a. Create custom portfolio per client objectives and suitability

Portfolios are constructed based on each individual client's short/long term goals, time horizon and risk preference.

- b. Match client to a constructed portfolio

After meeting with clients and forming a written plan, we work together to construct a portfolio with securities/products that align to their objectives.

Fees for investment management range from 1% to 1.3%.

Investnet is used to report client's portfolio performance. These reviews are conducted either monthly or annually based on client preference.

## Item 3 Disciplinary Information

David John Levorchick has been:

- found, in connection with an SRO proceeding, to have been involved in a violation of the SRO's rules and was barred or suspended from membership or from association with other members, or was expelled from membership
- found, in connection with an SRO proceeding, to have been involved in a violation of the SRO's rules and was fined more than \$2,500

Information regarding Mr. Levorchick can be found via the IAPD link ([www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov)).

## **Item 4 Other Business Activities**

### **A. Investment-Related Activities**

1. David John Levorchick is also engaged in the following investment-related activities:

#### **Registered representative of a broker-dealer**

Mr. Levorchick, as a registered representative of a broker/dealer may earn commissions, fees, trails and other forms of compensation for his separate brokerage related activities. This presents a conflict of interest due to recommendations and charges related to broker/dealer activities vs. advisory activities.

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

Mr. Levorchick is also a **licensed insurance agent**. As an agent he may earn commissions and fees related to insurance sales. This presents a conflict of interest as recommendations and charges may be generated in addition to advisory services.

### **B. Non Investment-Related Activities**

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

## **Item 6 Supervision**

**Supervisor:** Sal Malik

**Title:** Director of Supervision

**Phone Number:** 703-657-6075

In addition to an annual review of our firms policies and procedures, each advisor is subject to the following ongoing supervision and review:

1. Daily trade reviews
2. Monthly review of personal securities accounts
3. Monthly review of business bank statements of DBAs

4. Correspondence reviews - including ongoing capture and review of email
5. Periodic reviews of client account activity