

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

John R Halasz  
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**DBA: MARCHE GROUP LLC**

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April 2023

This brochure supplement provides information about John R Halasz 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 John R Halasz 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:** John R Halasz      **Born:** 1969

### **Education**

- Northeastern University; BS, Business Administration; 1992

### **Business Experience**

- Spire Investment Partners, LLC; Investment Advisor; from 2017 to Present
- Marche Group; Advisor; from 2012 to Present
- Calton & Associates; Investment Advisor; from 2016 to 2017
- Ameriprise; Investment Advisor; from 2012 to 2015
- Morgan Stanley; Investment Advisor; from 2010 to 2012

## **Item 3 Disciplinary Information**

John R Halasz has no reportable disciplinary history.

## **Item 4 Other Business Activities**

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

1. John R Halasz 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 separately from 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.

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

Mutual Fund 12b-1 commissions

Mutual Funds Trail Commissions

Direct Product Sponsor Commissions

**Insurance company or agency**

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.

Holding these additional licenses and allowing the advisor the ability to offer securities products and insurance products separately from 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.

2. John R. Halasz receives compensation through US Home Aggregation LLC, a real estate management company.

**B. Non Investment-Related Activities**

John R. Halasz 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**

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

**Item 6 Supervision**

**Supervisor:** Sal Malik

**Title:** Designated Principal

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

In addition to an in person 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 correspondence reviews - including ongoing capture and review of email
4. Periodic reviews of client account activity
5. Monthly review of business bank statements