

Part 2B of Form ADV: *Brochure Supplement*

Darren Christopher Port
4626 S. Biltmore Lane
Madison, WI 53718
608-237-1880

DBA: Tota Vita Financial Associates

Spire Wealth Management, LLC
7901 Jones Branch Dr., #810
McLean, VA 22102

April 2023

Item 1

This brochure supplement provides information about Darren Christopher Port 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 Darren Christopher Port is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: Darren Christopher Port

Born: 1976

Education

- University of Wisconsin; BS, Pre-Med; 1999

Business Experience

- Tota Vita Financial Associates; Financial Advisor; from 2017 to Present
- Waddell & Reed; Financial Advisor; from 2005 to 2017

Designations

Darren Christopher Port has earned the following designation(s) and is in good standing with the granting authority:

- Accredited Wealth Management Advisor; College for Financial Planning; 2007

The Accredited Wealth Management Advisor (AWMA®) designation is awarded by the College for Financial Planning to investment professionals who complete coursework in the areas of asset management, allocation and selection; investment performance and strategies; and taxation issues pertaining to investments for a broad range of investors including small businesses and deferred compensation plans. Advisors must sign a code of ethics and complete 16 hours of continuing education every two years.

Practice Management

We create custom portfolios per client objectives and suitability – We first take our client through our Riskalyze program to establish their personal “Risk Speed Limit”. That, in combination with our Investment Transfer Meeting discussion and IMA help us to understand if they have any special investment requests.

All investments are diligently researched through Morning Star, Lipper, Simply Wall Street, Zachs, independent research organizations, and many more.

We can match a client to a constructed portfolio – Riskalyze helps us to facilitate personal discussion and match our clients to the proper portfolio.

Our fees for Investment advisory services –Per household: 1.5% up to \$300k, 1.3% from \$300k to \$750k, 1.15% from \$750k to \$1mm, and 1% on everything over \$1mm.

Our fees for Financial Planning – Billable hours of \$250 / hour usually culminating in a ONE TIME flat \$2,500 fee when we build out the Unified Financial Plan.

We use Envestnet and Riskalyze to provide reviews of client portfolios, measuring efficiency and performance. We typically review each portfolio at least annually.

Item 3 Disciplinary Information

Darren Christopher Port has a reportable disclosure. For more information please check FINRA's BrokerCheck site.

Item 4 Other Business Activities

A. Investment-Related Activities

1. Darren Christopher Port 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:

1. Mutual Fund 12b-1 commissions
2. Mutual Funds Trail Commissions
3. Direct Product Sponsor Commissions

Other investment-related business

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

B. Non Investment-Related Activities

Darren Christopher Port 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

Darren has joined the Board of Advisors for Baseline Global, a real estate investment company. This is advisory only and not involved in offering or sales of product. Compensation is to be in the form of stock of the company.

Item 6 Supervision

Supervisor: Sal Malik

Title: Designated Supervisor

Phone Number: 703-657-6075

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

Daily trade reviews

Monthly review of personal securities accounts

Monthly review of Tota Vita business bank statements

Monthly correspondence reviews - including ongoing capture and review of email

Periodic reviews of client account activity