

Brochure Supplement

January 2024

LEAH N. SWANSON

8665 Hudson Blvd N, Suite 100
Lake Elmo, MN 55042

(800) 251-9932

This Brochure Supplement provides information about Leah N. Swanson that supplements the Disclosure Brochure of Landmark Wealth Management Group (hereinafter “LWMG”), a copy of which you should have received. Please contact LWMG’s Chief Compliance Officer, Sonia Goforth at 502-540-2593 or by e-mail Sonia.goforth@dinsmorecomplianceservices, if you did not receive the Disclosure Brochure or if you have any questions about the contents of this Brochure Supplement. Additional information about Leah N. Swanson is available on the SEC’s website at www.adviserinfo.sec.gov by searching the full name or Leah N. Swanson CRD# 6633402.

Landmark Wealth Management Group, a Registered Investment Adviser

8665 Hudson Blvd N, Suite 100, Lake Elmo, MN 55042 | (800) 251-9932
www.landmarkwealth.com

Item 2. Educational Background and Business Experience

Born 1995

Post-Secondary Education

Bethel University | BS, Finance | 2016

Recent Business Background

Landmark Wealth Management Group | Wealth Advisor | August 2022 – Present

Purshe Kaplan Sterling Investments | Registered Representative | July 2020 – Present

Thrivent Adviser Network | Wealth Advisor | July 2020 – August 2022

Thrivent Financial | Wealth Advisor | November 2017 – July 2020

Professional Designation

Leah N. Swanson holds the professional designation of CERTIFIED FINANCIAL PLANNER™ (“CFP®”).

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. (the “CFP Board”) to individuals who meet its education, examination, experience and ethics requirements. Eligible candidates are generally required to have three years of financial planning related experience and possess a bachelor’s degree from an accredited U.S. college or university. Certificants are further required to complete a CFP Board-Registered Education Program (or possess a qualifying professional credential), clear a personal and professional background check, and pass the CFP® Certification Examination, a ten-hour multiple choice exam divided into three separate sessions. In order to maintain the certification, CFP® designees must also complete at least 30 hours of continuing education every two years on an ongoing basis.

Item 3. Disciplinary Information

LWMG is required to disclose information regarding any legal or disciplinary events material to a client’s evaluation of Leah N. Swanson. LWMG has no information to disclose in relation to this Item.

Item 4. Other Business Activities

LWMG is required to disclose information regarding any investment-related business or occupation in which Leah N. Swanson is actively engaged.

Registered Representative of a Broker-Dealer

Leah N. Swanson is a registered representative of Purshe Kaplan Sterling Investments (“PKS”), an SEC registered broker-dealer and member of FINRA. In this capacity, Leah N. Swanson may provide securities

brokerage services and implement securities transactions under a commission based arrangement. Leah N. Swanson may be entitled to a portion of the brokerage commissions paid to *PKS*, as well as a share of any ongoing distribution or service (“trail”) fees from the sale of mutual funds.

A conflict of interest exists to the extent that Leah N. Swanson recommends the purchase of securities where she receives commissions or other additional compensation as a result. This practice may give her an incentive to recommend investment products based on compensation received rather than on the client’s needs. LWMG has procedures in place to ensure that all recommendations are made in the best interests of clients regardless of any additional compensation earned. For certain accounts covered by ERISA (and such others that the firm deems appropriate), LWMG provides investment advisory services on a fee offset basis, whereby the firm reduces its fee by an amount equal to the aggregate commissions and 12b-1 fees earned by Leah N. Swanson in her individual capacity as a registered representative of *PKS*.

Licensed Insurance Agent

Leah N. Swanson is a licensed insurance agent and in such capacity may recommend, on a fully-disclosed commission basis, the purchase of certain insurance products. A conflict of interest exists to the extent that LWMG recommends the purchase of insurance products where Leah N. Swanson receives insurance commissions or other additional compensation. LWMG seeks to ensure that all recommendations are made in the best interests of clients regardless of any additional compensation earned.

Item 5. Additional Compensation

LWMG is required to disclose information regarding any arrangement under which Leah N. Swanson receives an economic benefit from someone other than a client for providing investment advisory services. LWMG has no information to disclose in relation to this Item.

Item 6. Supervision

Sonia Goforth, Chief Compliance Officer, is generally responsible for supervising Leah N. Swanson’s advisory activities on behalf of LWMG. Sonia Goforth can be reached at the firm’s main telephone number listed on the cover page of this Brochure Supplement.

LWMG supervises its personnel and the investments made in client accounts. LWMG monitors the investments recommended by Leah N. Swanson to ensure they are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance, as well as any restrictions previously requested by the client. LWMG periodically reviews the advisory activities of Leah N. Swanson, which may include reviewing individual client accounts and correspondence (including e-mails) sent and received by Leah N. Swanson.