

This brochure supplement provides information about Devyn Jeremy DeLeon that supplements the DeLeon Wealth LLC brochure. You should have received a copy of that brochure. Please contact Devyn Jeremy DeLeon if you did not receive DeLeon Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Devyn Jeremy DeLeon is also available on the SEC's website at www.adviserinfo.sec.gov.

DeLeon Wealth LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Devyn Jeremy DeLeon

Personal CRD Number: 6820005

Investment Adviser Representative

DeLeon Wealth LLC
201 N Edison St., Suite 229
Kennewick, WA 99338
(208) 771-3916
devyn@deleonwealth.com

UPDATED: 04/17/2025

Item 2: Educational Background and Business Experience

Name: Devyn Jeremy DeLeon **Born:** 1997

Educational Background and Professional Designations:

Education:

B.A. Finance, University of Idaho - 2019

Designations:

CFP® - Certified Financial Planner

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- ii. Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business Background:

10/2024 - Present	Managing Partner, Co-CEO DeLeon Wealth LLC
06/2021 – -03/2025	Investment Adviser Representative Brighton Jones
09/2019 - 06/2021	Portfolio Reconciliation Analyst Russell Investments
05/2019 - 08/2019	Travelling Abroad Senior Trip
08/2018 - 05/2019	Student University of Idaho
05/2018 - 08/2018	Client Service Analyst Intern Clearwater Analytics
08/2017 - 05/2018	Student University of Idaho
05/2017 - 08/2017	Wealth Management Intern Merrill Lynch
05/2017 - 08/2017	Valet Coeur D Alene Resort
08/2016 - 05/2017	Student University of Idaho

05/2016 - 08/2016	Window Washing / Replacement / Maintenance A Better View
08/2015 - 05/2016	Student University of Idaho
04/2014 - 06/2015	Front Desk / Gym Staff 360 Fitness
03/2012 - 08/2014	Pro Shop Staff Hayden Lake Country Club

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Devyn Jeremy DeLeon is is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

Devyn Jeremy DeLeon does not receive any economic benefit from any person, company, or organization, other than DeLeon Wealth LLC in exchange for providing clients advisory services through DeLeon Wealth LLC.

Item 6: Supervision

As the Chief Compliance Officer of DeLeon Wealth LLC, Konner DeLeon supervises all activities of the firm. Konner DeLeon's contact information is 208- 771-3916; konner@deleonwealth.com. Devyn Jeremy DeLeon adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

Item 7: Requirements For State Registered Advisers

This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.

A. Devyn Jeremy DeLeon has NOT been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.

B. Devyn Jeremy DeLeon has NOT been the subject of a bankruptcy.