

**Form ADV Part 2B – Brochure Supplement  
Item 1: Cover Page  
April 2021**

Western Wealth Management LLC  
Doing business as

**White Hawk Wealth Management**

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Firm Contact:  
G.E. Buenning, Chief Compliance Officer

**Jonathan “JD” White  
CRD#5882055**

This brochure supplement provides information about JD White that supplements our brochure. You should have received a copy of that brochure. Please contact G.E. Buenning, Chief Compliance Officer if you did not receive our firm’s brochure or if you have any questions about the contents of this supplement.

Additional information about JD White is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and/or FINRA’s Broker Check at [www.finra.org/brokercheck](http://www.finra.org/brokercheck).

## Item 2: Educational Background & Business Experience

### **Jonathan "JD" White**

Year of Birth: 1983

#### **Educational Background:**

- Southern Methodist University 2006 – Real Estate Finance with a Minor in Advertising

#### **Business Background:**

- 2007 – 2010 – White & White Realty – Co-Owner
- 2010 – 2011 – The Edge Realty – President
- 2010 – 2017 – Edward Jones – Financial Advisor
- 2017 – Current – LPL Financial – Registered Representative
- 2017 – Current – Western Wealth Management LLC – Investment Adviser Representative

#### **Exams & Professional Designations:**

- 02/25/2011 - Series 7 - General Securities Representative Examination
- 03/11/2011 – Series 66 - Uniform Combined State Law Examination
- 2012 – Accredited Asset Management Specialist
- 2015 – Chartered Retirement Planning Counselor

AAMS® - Accredited Assets Management Specialist: The College for Financial Planning® awards the ACCREDITED ASSET MANAGEMENT SPECIALISTS AND AAMS® designation to students who successfully complete the program, pass the final examination and comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct and Terms and Conditions. Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are required to be disclosed. Continued use of the AAMS® designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the AAMS® designation by completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self-disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct

CRPC - Chartered Retirement Planning Counselor: J.D. White has a professional designation, Chartered Retirement Planning Counselor (CRPC). The CRPC is offered by The College for Financial Planning®. The CRPC Program focuses on the pre- and post-retirement needs of individuals. Enrollment in the program guides you through the retirement process, addressing issues such as estate planning and asset management. The College for Financial Planning® awards the Chartered Retirement Planning Counselor SM and CRPC® designation to students who: successfully complete the program; pass the final examination; and comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct promulgated by The College for Financial Planning®. Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are required to be disclosed. Successful students receive a certificate and are granted the right to use the designation on correspondence and business cards for a two-year period.

Continued use of the CRPC® designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the CRPC® designation by: completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self-disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct.

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to your evaluation of Mr. White. There may be items that are contained on [www.brokercheck.finra.org](http://www.brokercheck.finra.org) or [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) that you may wish to review and consider in your evaluation of your advisor's background.

### **Item 4: Other Business Activities**

Mr. White is a Registered Representative of LPL Financial, member FINRA/SIPC. As a Registered Representative, Mr. White may solicit, offer and sell securities through LPL Financial and may receive separate, yet normal and customary commission compensation as a result of executing purchases and sales of brokerage transactions on behalf of investment advisory clients. The client is under no obligation to purchase or sell securities through Mr. White or LPL Financial. In addition, Mr. White may receive other compensation such as mutual fund or money market 12b-1 fees (marketing fees) and trail commissions from variable insurance products. The potential for receipt of commissions and other compensation may create a conflict of interest and provide an incentive for Mr. White to recommend investment products based on the compensation received, rather than on the client's needs. WWM addresses this conflict of interest by requiring Mr. White to disclose to the client at the time a brokerage account is opened through LPL Financial the nature of the transaction or relationship, his role as an LPL Registered Representative, and any compensation including commissions and 12b-1 fees that may be paid by the client and/or received by Mr. White.

Mr. White is a licensed insurance agent/broker. He may offer insurance products and receive normal and customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation he may earn and may not necessarily be in the best interests of the client. In order to minimize this conflict of interest, Mr. White will place client interests ahead of his own interests and adhere to our firm's Code of Ethics. Clients are informed they are not obligated to purchase these products.

Mr. White conducts the above investment related activities and may also conduct other business or investment related activities under the Doing Business As ("DBA") name of White Hawk Wealth Management. White Hawk Wealth Management is a separate entity from and is not owned or controlled by Western Wealth Management or LPL Financial.

Mr. White is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

### **Item 5: Additional Compensation**

In connection with the transition of Mr. White's clients to the LPL Financial custodial platform and Mr. White's association as a registered representative of LPL Financial, Mr. White received or will receive financial transition support from LPL Financial in the form of a transition credit and a 2 year repayable

loan. The transition credit received by Mr. White in March of 2017 is in the form of an upfront cash payment. The amount of the upfront cash payment represents a substantial payment. The amount of the loan, paid to Mr. White in March of 2017, represents a substantial payment. The loan is intended to provide working capital to Mr. White in order to cover start up or operating costs. We encourage you to discuss any such conflicts of interest with your representative before making a decision to custody your assets at LPL Financial. The payment(s) Mr. White received or will receive is/are in addition to the production bonuses, stock options and other economic benefits that he is entitled to receive as a registered representative of LPL Financial. The amount of these payments are significant in relation to the overall revenue earned or compensation received by Mr. White at his prior firm. Such payments are based on the size of the representative's business established at his prior firm and/or assets expected to be under custody on the LPL Financial platform. As a result, Mr. White has a financial incentive to recommend that clients establish an account with LPL Financial. This financial incentive creates a conflict of interest in connection with Mr. White's recommendation of LPL Financial.

Mr. White may receive economic benefits from persons other than clients in connection with advisory services. Please ask your financial advisor about whether he receives any of the forms of additional compensation outlined below.

Your Advisor may receive compensation from LPL Financial in different ways, such as payments based on production, awards of stock options to purchase shares of LPL's parent company, LPL Financial Holdings Inc., reimbursement of fees that your financial advisor pays to LPL for items such as administrative services, and other things of value such as free or reduced-cost marketing materials, payments in connection with the transition of association from another broker/dealer or investment advisor firm to LPL, advances of advisory fees, or attendance at LPL's national conference or top producer forums and events. LPL may pay your financial advisor this compensation based on his overall business production and/or on the amount of assets custodied at LPL Financial. Therefore, the amount of this compensation may be more than what your financial advisor would receive if the client participated in other programs or paid separately for investment advice, brokerage and other client services. Therefore, your financial advisor may have a financial incentive to recommend an advisory program over other programs and services. However, your financial advisor may only recommend a program or service that he believes is suitable for you.

Mr. White may be eligible to receive cash and/or non-cash compensation from product sponsors for recommending certain types of insurance or other investment products. Compensation may include such items as gifts valued at less than \$100 annually, an occasional dinner or ticket to a sporting event, or reimbursement in connection with educational and training meetings or marketing or advertising initiatives. Product sponsors may also pay for education or training events that they may attend. While Western Wealth Management and LPL Financial endeavor at all times to put the interests of our clients first as part of our fiduciary obligation, the possibility of receiving cash and non-cash compensation could create a conflict of interest when recommending certain products.

## **Item 6: Supervision**

Western Wealth Management LLC maintains a supervisory structure and system reasonably designed to prevent violations of the Investment Advisers Act of 1940. G.E. Buenning, Chief Compliance Officer of Western Wealth Management LLC, supervises and monitors Mr. White's activities on a regular basis. G.E. Buenning is responsible for administering the Western Wealth Management policies and procedures for investment advisory activities and for regularly evaluating their effectiveness. Please contact G.E. Buenning if you have any questions about Mr. White's brochure supplement at 303-393-2404.