



Jackson, MS 39216  
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This Brochure Supplement provides information about Jonathan Davis, Independent Investment Advisor Representative, which supplements the Valmark Advisers, Inc. (“Valmark”) Form ADV Part 2A Brochure. Please inform Jonathan Davis at the contact information listed above if you did not receive Valmark’s Form ADV Part 2A Brochure or if you have any questions about the contents of this supplement. Additional information about Valmark and Jonathan Davis is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and FINRA’s website at [www.finra.org/brokercheck](http://www.finra.org/brokercheck).

### **Educational Background and Business Experience**

Jonathan M. Davis

Date of Birth: 03/11/1981

Education:

- Bachelor’s degree: The University of Mississippi

Examinations and Professional Designations:

- AIF® – Accredited Investment Fiduciary®  
The AIF® designation is offered and recognized by the Center for Fiduciary Studies. To earn the AIF®, candidates must a) complete a web-based educational program or a capstone program, and b) pass a final certification exam. Those who obtain the AIF® must complete 6 hours of continuing education annually.
- FINRA Series 6 License - Investment Company Products/Variable Contracts Limited Representative
- FINRA Series 63 License - Uniform Securities Agent State Law Exam
- FINRA Series 65 License - Investment Advisors Law Exam
- Insurance Licenses: Life, Accident and Health and Variable Contracts

Business Experience: Partner – Rivertree Financial Planning – 2013

- Registered Representative- ValMark Securities, Inc. October 18, 2021 to present
- Investment Advisor Representative- Valmark Advisers, Inc. October 18, 2021 to present

### Disciplinary Information

Registered Investment Advisers are required to disclose material facts regarding any investment related legal or disciplinary events, including issues involving criminal or civil actions, findings resulting from administrative proceeding before the SEC, a self-regulatory body or any other federal or state regulatory authority that would be material to your evaluation of each supervised person providing investment advice.

Jonathan Davis has no disciplinary record that would impact a client's evaluation of the practice.

### Other Business Activities

Jonathan Davis is a Registered Representative of Valmark Securities, Inc., a broker dealer under common ownership and management of Valmark Advisers, Inc.

Jonathan Davis is also an insurance agent affiliated with Executive Insurance Agency, Inc., an agency under common ownership and management of Valmark Advisers, Inc.

Jonathan Davis is President of Leinster Financial Inc., a financial services corporation not affiliated with Valmark Advisers, Inc.

### Additional Compensation

As a Registered Representative of an affiliated broker dealer, Valmark Securities, Inc., Jonathan Davis is eligible to receive normal commissions associated with securities sales.

Jonathan Davis is also eligible to receive insurance commissions surrounding the sales of insurance products sold through the affiliated insurance agency, Executive Insurance Agency, Inc.

Jonathan may receive compensation from Leinster Financial Inc. Leinster Financial Inc. is also a shareholder in Rivertree Financial Planning, LLC.

### Supervision

Jonathan Davis is an independent investment advisor representative. However, before accepting and implementing investment strategies recommended, supervisory principals at the Valmark home office review and approve of the investment strategies. Accounts are reviewed periodically, usually at least annually by the independent advisor. The home office compliance team also periodically reviews accounts and strategies. These initial and ongoing reviews are under the direction of OSJ Principal Zach Hurst who may be reached at 330-576-1234 to discuss questions or concerns in connection with the internal compliance program.