

Item 1: Cover Page

One Wealth Management Investment and Advisory Services, LLC



Form ADV Part 2B Brochure Supplement for Jeremy Dicker

Address: 1111 Lincoln Rd.
Suite 500
Miami Beach, FL 33139

Phone: (855) 663-9584

Email: jeremy@onewealthmgmt.com

This brochure supplement provides information about Jeremy Dicker that supplements the One Wealth Management Investment and Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact One Wealth Management Investment and Advisory Services, LLC if you did not receive One Wealth Management Investment and Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Jeremy Dicker is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 2706452.

Item 2: Educational Background & Business Experience

Name: Jeremy Paul Dicker

Year of Birth: 1977

Education: High School Diploma
1995

Business Background:

- Insurance Agent
MassMutual Life
Nov 2023 – Present
- CEO
One Wealth Management Investment and Advisory Services, LLC
Sep 2023 – Present
- IAR
One Wealth Management Investment and Advisory Services, LLC
Jul 2023 – Present
- Insurance Broker
Guardian Life Insurance Company
Dec 2018 – June 2023
- Registered Representative
Park Avenue Securities
Dec 2018 – Jun 2023
- Owner, Insurance Broker
One Wealth Management Financial and Insurance Services, Inc.
Dec 2015 – Present

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Jeremy Dicker.

Item 4: Other Business Activities

- A. Jeremy Dicker is a licensed insurance agent through One Wealth Management Financial and Insurance Services, Inc., an insurance agency. From time, Jeremy Dicker will earn an ordinary and customary commission from the sale of an insurance product in such capacity. This creates a conflict of interest, because Jeremy Dicker has the potential to earn both an insurance commission and advisory fee revenue from a client. Jeremy Dicker addresses this conflict of interest by fully disclosing his relationship with the applicable insurance provider, and informing clients that they are under no obligation to purchase an insurance product through him.
- B. Jeremy Dicker is actively engaged with ONE Wine Consulting, LLC for which he devotes approximately 10 hours per month.

Item 5: Additional Compensation

Jeremy Dicker does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through One Wealth Management Investment and Advisory Services, LLC.

Item 6: Supervision

Jeremy Dicker is supervised and monitored by Ericka Herrera, Chief Compliance Officer, pursuant to One Wealth Management Investment and Advisory Services, LLC's written policies and procedures and code of ethics. Ericka Herrera may be reached at eherrera@onewealthmgmt.com.

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One Wealth Management Investment and Advisory Services, LLC



Form ADV Part 2B Brochure Supplement for Jordan Linn

Address: 1111 Lincoln Rd.
Suite 500
Miami Beach, FL 33139

Phone: (855) 663-9584

Email: jlinn@onewealthmgmt.com

This brochure supplement provides information about Jordan Linn that supplements the One Wealth Management Investment and Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact One Wealth Management Investment and Advisory Services, LLC if you did not receive One Wealth Management Investment and Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Jordan Linn is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 2664439.

Item 2: Educational Background & Business Experience

Name: Jordan Alan Linn

Year of Birth: 1975

Education: Bachelor's in Business
University of Florida
1997

Business Background: Co-Founder, IAR
One Wealth Management Investment and Advisory Services, LLC
Jan 2024 – Present

Owner & Licensed Insurance Broker/Agent
One Wealth Insurance Brokerage Service, LLC
May 2018 – Present

Principal, IAR
One Wealth Management Investment and Advisory Services, LLC
Sep 2017 – Dec 2023

IAR
Argentus Advisors, LLC
Jul 2011 – Oct 2019

Item 3: Disciplinary Information

Mr. Linn is not currently the subject of any pending legal, disciplinary or administrative proceedings, however he has been in the past. In 12/2011, Mr. Linn failed to amend his U-4 to disclose a lien on one of his real estate properties. He paid a fine of \$2500.00 to FINRA and was suspended for 30 days from FINRA related activities. Additionally, in 1/09/2014, he paid a fine of \$1,500.00 to the New York state Department of Financial Services, for failing to disclose the previous event with FINRA while renewing his N.Y. state insurance license.

Mr. Linn has never been accused or found liable in any arbitration claim alleging damages in excess of \$2,500, involving an investment or an investment-related business or activity; fraud, false statements, or omissions; theft, embezzlement, or other wrongful taking of property; bribery, forgery, counterfeiting, or extortion; or dishonest, unfair or unethical practices.

Mr. Linn has never paid an award or otherwise being found liable in a civil proceeding involving an investment or an investment-related business or activity; fraud, false statements, or omissions; theft, embezzlement, or other wrongful taking of property; bribery, forgery, counterfeiting, or extortion.

More details can be found through Broker Check (BrokerCheck) or the Investment Adviser Public Disclosure site (www.adviserinfo.sec.gov) by performing by name searches.

Item 4: Other Business Activities

Jordan Linn is a licensed insurance broker and agent with various insurance carriers. Insurance is sold through One Wealth Insurance Brokerage Services, LLC, an insurance brokerage agency licensed in the state of Florida. In his capacity as an insurance broker/agent, Mr. Linn may recommend insurance products and receive compensation in the form of commissions. This activity presents a conflict of interest

between the interests of Jordan Linn and those of the advisory clients. However, clients are under no obligation to act upon any recommendations of Mr. Linn or affect any transactions through Mr. Linn if they decide to follow the recommendations.

Item 5: Additional Compensation

Jordan Linn does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through One Wealth Management Investment and Advisory Services, LLC.

Item 6: Supervision

Jordan Linn is supervised and monitored by Ericka Herrera, Chief Compliance Officer, pursuant to One Wealth Management Investment and Advisory Services, LLC's written policies and procedures and code of ethics. Ericka Herrera may be reached at eherrera@onewealthmgmt.com.

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One Wealth Management Investment and Advisory Services, LLC



Form ADV Part 2B Brochure Supplement for Timothy Pearce

Address: 1111 Lincoln Rd.
Suite 500
Miami Beach, FL 33139

Phone: (885) 663-9584

Email: tjpearce@onewealthmgmt.com

This brochure supplement provides information about Timothy Pearce that supplements the One Wealth Management Investment and Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact One Wealth Management Investment and Advisory Services, LLC if you did not receive One Wealth Management Investment and Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Timothy Pearce is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 6426093.

Item 2: Educational Background & Business Experience

Name: Timothy Jerald Pearce

Year of Birth: 1990

Education: Master of Arts, History
Wheaton College
2015

Business Background: Senior Vice President
One Wealth Management Investment and Advisory Services, LLC
Jul 2023 – Present

Agent
Guardian Life Insurance Company
Mar 2019 – Jun 2023

Registered Representative
Park Avenue Securities, LLC
Mar 2019 – Jun 2023

Representative
Northwestern Mutual Wealth Management Company
Aug 2016 – Mar 2019

Registered Representative
Northwestern Mutual Investment Services LLC
Jun 2015 – Mar 2019

Agent
Northwestern Mutual Life Insurance Company
Jan 2015 – Mar 2019

Professional Designations: Certified Financial Planner ®

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications and standards required of a CFP® may be found by visiting the CFP® Board of Standard's website at <http://www.cfp.net/>.

Retirement Income Certified Professional® (RICP®)

The Retirement Income Certified Professional® program provides an extensive and intensive retirement income education that is available exclusively at [The American College of Financial Services](http://www.americancollege.com). In order to obtain the RICP® certification, individuals must have three years of

relevant professional experience and a high school diploma or equivalent, pay a tuition fee, complete three online self-study courses in 12 months or less, and pass the closed-book proctored final course exams. In order to maintain the certification, individuals must complete 30 hours of continuing education every two years, including one hour of ethics.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Timothy Pearce.

Item 4: Other Business Activities

- A. Timothy Pearce is a licensed insurance agent and from time to time will earn an ordinary and customary commission from the sale of an insurance product in such capacity. This creates a conflict of interest, because Timothy Pearce has the potential to earn both an insurance commission and advisory fee revenue from a client. Timothy Pearce addresses this conflict of interest by fully disclosing his relationship with the applicable insurance provider, and informing clients that they are under no obligation to purchase an insurance product through him.
- B. Timothy Pearce is not actively engaged in any other business or occupation for compensation that provides a substantial source of income or involves a substantial amount of time.

Item 5: Additional Compensation

Timothy Pearce does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through One Wealth Management Investment and Advisory Services, LLC.

Item 6: Supervision

Timothy Pearce is supervised and monitored by Ericka Herrera, Chief Compliance Officer, pursuant to One Wealth Management Investment and Advisory Services, LLC's written policies and procedures and code of ethics. Ericka Herrera may be reached at eherrera@onewealthmgmt.com.

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One Wealth Management Investment and Advisory Services, LLC



Form ADV Part 2B Brochure Supplement for Ryan Cleary

Address: 1111 Lincoln Rd.
Suite 500
Miami Beach, FL 33139

Phone: (855) 663-9584

Email: rcleary@onewealthmgmt.com

This brochure supplement provides information about Ryan Cleary that supplements the One Wealth Management Investment and Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact One Wealth Management Investment and Advisory Services, LLC if you did not receive One Wealth Management Investment and Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Ryan Cleary is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 5710694.

Item 2: Educational Background & Business Experience

Name: Ryan Tomas Cleary

Year of Birth: 1982

Education: Bachelor in Finance
W.P. Carey School of Business, Arizona State University
2008

Business Background: Managing Director, Investments
One Wealth Management Investment and Advisory Services, LLC
Jul 2023 – Present

Agent
Guardian Life Insurance Company
Dec 2018 – Jun 2023

Registered Representative
Park Avenue Securities, LLC
Dec 2018 – Jun 2023

Sales Assistant
Park Avenue Securities, LLC
Feb 2020 – Sep 2022

Registered Sales Assistant
Mass Mutual Life Insurance Company
Dec 2012 – Nov 2018

Registered Sales Assistant
MML Investors Services, LLC
Dec 2012 – Nov 2018

Professional Designations: Chartered Financial Consultant (ChFC®)

The [Chartered Financial Consultant](#) (ChFC®) designation is issued by [The American College](#). The ChFC® program covers a list of requirements for financial advisors, from knowledge on tax and retirement planning to special needs advising, wealth management, insurance, and more. The designation provides a baseline understanding of what it takes to be successful as a financial consultant. A candidate for designation must have three years of full-time business experience within the five years before the designation is awarded. Candidates must complete six core and two elective courses, agree to comply with The American College [Code of Ethics](#), pay all course and exam fees, and pass a proctored final exam for each course. Designates must complete 30 hours of continuing education every two years.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Ryan Cleary.

Item 4: Other Business Activities

- A. Ryan Cleary is not actively engaged in any other investment-related business or occupation.
- B. Ryan Cleary is not actively engaged in any other business or occupation for compensation that provides a substantial source of income or involves a substantial amount of time.

Item 5: Additional Compensation

Ryan Cleary does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through One Wealth Management Investment and Advisory Services, LLC.

Item 6: Supervision

Ryan Cleary is supervised and monitored by Ericka Herrera, Chief Compliance Officer, pursuant to One Wealth Management Investment and Advisory Services, LLC's written policies and procedures and code of ethics. Ericka Herrera may be reached at eherrera@onewealthmgmt.com.

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One Wealth Management Investment and Advisory Services, LLC



Form ADV Part 2B Brochure Supplement for Brandon Tesar

Address: 1111 Lincoln Rd.
Suite 500
Miami Beach, FL 33139

Phone: (855) 663-9584

Email: btesar@onewealthmgmt.com

This brochure supplement provides information about Brandon Tesar that supplements the One Wealth Management Investment and Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact One Wealth Management Investment and Advisory Services, LLC if you did not receive One Wealth Management Investment and Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Brandon Tesar is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 6126593.

Item 2: Educational Background & Business Experience

Name: Brandon Wells Tesar

Year of Birth: 1979

Education: Bachelor of Fine Arts, Theatre, History, Psychology
New York University
2001

Business Background: Director of Investment Operations & Financial Planning
One Wealth Management Investment and Advisory Services, LLC
Jul 2023 – Present

Actor, Director, Writer, Assistant
Self Employed, Entertainment
Jan 2000 – Present

Agent
Guardian Life Insurance Company
Dec 2018 – Jun 2023

Registered Representative
Park Avenue Securities, LLC
Dec 2018 – Jun 2023

Director of Financial Planning
One Wealth Management
Apr 2016 – Jun 2023

Registered Representative
MML Investors Services LLC
Oct 2012 – Dec 2018

Agent/Sales Assistant
MassMutual Life Insurance Company
May 2012 – Dec 2018

Bartender
Yummy Bartenders
Nov 2011 – Dec 2018

Item 3: Disciplinary Information

Brandon Tesar has a disciplinary history, the details of which can be found on the Investment Adviser Public Disclosure website (<https://adviserinfo.sec.gov/individual/summary/6126593>). A client may access such disciplinary history by visiting this hyperlinked website and clicking into the applicable disclosures listed in the “Disclosure(s)” section.

Item 4: Other Business Activities

- A. Brandon Tesar is a licensed insurance agent and from time to time will earn an ordinary and customary commission from the sale of an insurance product in such capacity. This creates a conflict of interest, because Brandon Tesar has the potential to earn both an insurance commission and advisory fee revenue from a client. Brandon Tesar addresses this conflict of interest by fully disclosing his relationship with the applicable insurance provider, and informing clients that they are under no obligation to purchase an insurance product through him.
- B. Brandon Tesar is not actively engaged in any other business or occupation for compensation that provides a substantial source of income or involves a substantial amount of time.

Item 5: Additional Compensation

Brandon Tesar does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through One Wealth Management Investment and Advisory Services, LLC.

Item 6: Supervision

Brandon Tesar is supervised and monitored by Ericka Herrera, Chief Compliance Officer, pursuant to One Wealth Management Investment and Advisory Services, LLC's written policies and procedures and code of ethics. Ericka Herrera may be reached at eherrera@onewealthmgmt.com.

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Form ADV Part 2B Brochure Supplement for Peter Hoopis

Address: 1111 Lincoln Rd.
Suite 500
Miami Beach, FL 33139

Phone: (855) 663-9584

Email: phoopis@onewealthmgmt.com

This brochure supplement provides information about Peter Hoopis that supplements the One Wealth Management Investment and Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact One Wealth Management Investment and Advisory Services, LLC if you did not receive One Wealth Management Investment and Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Peter Hoopis is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 3272874.

Item 2: Educational Background & Business Experience

Name: Peter Harry Hoopis

Year of Birth: 1976

Education: CLU, Insurance, Financial Consultant, Leadership
The American College of Financial Services
2010

Bachelor of Science (BS), Finance and Marketing
University of Denver - Daniels College of Business
1999

Business Background: President
One Wealth Management Investment and Advisory Services, LLC
Sep 2023 – Present

Registered Representative
Park Avenue Securities
Mar 2021 – Jun 2023

Agent
Guardian Life Insurance Company
Mar 2021 – Apr 2022

Investment Adviser Representative
Eagle Strategies LLC
Jun 2020 – Mar 2021

Registered Representative
NYLIFE Securities LLC
May 2020 – Feb 2021

Agent
New York Life Insurance
Mar 2020 – Feb 2021

General Agent
MML Investors Services, LLC
Jul 2012 – Feb 2020

General Agent
MassMutual Financial Group
Apr 2012 – Jan 2020

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Peter Hoopis.

Item 4: Other Business Activities

- A. Peter Hoopis is a licensed insurance agent and from time to time will earn an ordinary and customary commission from the sale of an insurance product in such capacity. This creates a conflict of interest, because Peter Hoopis has the potential to earn both an insurance commission and advisory fee revenue from a client. Peter Hoopis addresses this conflict of interest by fully disclosing his relationship with the applicable insurance provider, and informing clients that they are under no obligation to purchase an insurance product through him.
- B. Peter Hoopis is not actively engaged in any other business or occupation for compensation that provides a substantial source of income or involves a substantial amount of time.

Item 5: Additional Compensation

Peter Hoopis does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through One Wealth Management Investment and Advisory Services, LLC.

Item 6: Supervision

Peter Hoopis is supervised and monitored by Ericka Herrera, Chief Compliance Officer, pursuant to One Wealth Management Investment and Advisory Services, LLC's written policies and procedures and code of ethics. Ericka Herrera may be reached at eherrera@onwealthmgmt.com.

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One Wealth Management Investment and Advisory Services, LLC



Form ADV Part 2B Brochure Supplement for Thomas Hughes

Address: 1111 Lincoln Rd.
Suite 500
Miami Beach, FL 33139

Phone: (855) 663-9584

Email: thughes@onewealthmgmt.com

This brochure supplement provides information about Thomas Hughes that supplements the One Wealth Management Investment and Advisory Services, LLC brochure. You should have received a copy of that brochure. Please contact One Wealth Management Investment and Advisory Services, LLC if you did not receive One Wealth Management Investment and Advisory Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Thomas Hughes is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 4798877.

Item 2: Educational Background & Business Experience

Name: Thomas Andrew Hughes

Year of Birth: 1981

Education: Bachelor in Business Administration, Finance and Economics
California State University
2005

Business Background:

- Senior Financial Analyst
One Wealth Management Investment and Advisory Services, LLC
Jul 2023 – Present
- Agent
Guardian Life Insurance Company
Oct 2022 – Jun 2023
- Senior Financial Analyst
One Wealth Management
Jul 2019 – Jun 2023
- Registered Representative
Park Avenue Securities, LLC
Oct 2022 – Jun 2023
- Sales Assistant
Guardian Life Insurance Company
Feb 2020 – Sep 2022
- Sales Assistant
Park Avenue Securities, LLC
Feb 2020 – Sep 2022
- Senior Financial Analyst
Automatic Data Processing
Mar 2017 – Jul 2019

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Thomas Hughes.

Item 4: Other Business Activities

- A. Thomas Hughes is not actively engaged in any other investment-related business or occupation.
- B. Thomas Hughes is not actively engaged in any other business or occupation for compensation that provides a substantial source of income or involves a substantial amount of time.

Item 5: Additional Compensation

Thomas Hughes does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through One Wealth Management Investment and Advisory Services, LLC.

Item 6: Supervision

Thomas Hughes is supervised and monitored by Ericka Herrera, Chief Compliance Officer, pursuant to One Wealth Management Investment and Advisory Services, LLC's written policies and procedures and code of ethics. Ericka Herrera may be reached at eherrera@onwealthmgmt.com.

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One Wealth Management Investment and Advisory Services, LLC



Form ADV Part 2B Brochure Supplement for Ericka Herrera

Address: 1111 Lincoln Rd.
Suite 500
Miami Beach, FL 33139

Phone: (855) 663-9584

Email: eherrera@onewealthmgmt.com

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Additional information about Ericka Herrera is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 6707329.

Item 2: Educational Background & Business Experience

Name: Ericka V Herrera

Year of Birth: 1978

Education: Doctor of Optometry
Nova Southeastern University
2007

Business Background: CCO
One Wealth Management Investment and Advisory Services, LLC
Aug 2023 – Present

Employee
One Wealth Management Financial And Insurance Services, Inc.
Jul 2023 – Present

Fiduciary
One Wealth Management Investment and Advisory Services, LLC
Apr 2018 – Present

Loan Officer
AmeriSave Mortgage Corporation
Jun 2020 – Feb 2021

Administrative Associate
MML Investors Services, LLC
Sep 2016 – Feb 2018

Shareholder & Optometrist
Family Eye Health
Sep 2007 – Aug 2016

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Ericka Herrera.

Item 4: Other Business Activities

- A. Ericka Herrera is not actively engaged in any other investment-related business or occupation.
- B. Ericka Herrera is employed by One Wealth Management Financial And Insurance Services, Inc., an insurance agency under common control with One Wealth Management Investment and Advisory Services, LLC.

Item 5: Additional Compensation

Ericka Herrera does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through One Wealth Management Investment and Advisory Services, LLC.

Item 6: Supervision

Ericka Herrera is supervised and monitored by Jordan Linn, Principal, pursuant to Firm Legal Name's written policies and procedures and code of ethics. Jordan Linn may be reached at jlinn@onewealthmgmt.com.