

**Part 2B of Form ADV: *Brochure Supplement***

**DBA:**



**David John Levorchick**

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**Spire Wealth Management**

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This brochure supplement provides information about David John Levorchick that supplements the Spire Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Spire Compliance at 703-657-6060 if you did not receive Spire Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about David John Levorchick is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

**Full Legal Name:** David John Levorchick

**Born:** 1982

**Education:**

- Wright State University, Bachelor of Science, Business/Financial Services, 2005

**Business Experience**

- Spire Wealth Management DBA Levorchick Wealth Management, Investment Advisor, August 2020 - Present
- E.K. Riley Investments, Investment Advisor, December 2014 to August 2020
- U. S. Bancorp, Investment Advisor, 2007 to 2014

## Item 3 Disciplinary Information

David John Levorchick has been:

- Found, in connection with an SRO proceeding, to have been involved in a violation of the SRO's rules and was barred or suspended from membership or from association with other members or was expelled from membership.
- Found, in connection with an SRO proceeding, to have been involved in a violation of the SRO's rules and was fined more than \$2,500. Information regarding Mr. Levorchick can be found via the IAPD link ([www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov)).

## Item 4 Other Business Activities

### A. Investment-Related Activities

David John Levorchick is also engaged in the following investment-related activities:

#### **Registered representative of a broker-dealer**

Advisor also carries the securities licenses required by FINRA (Financial Industry Regulatory Authority) to offer securities products and execute securities transactions separately from their registration as an Investment Advisor Representative providing investment advice. This additional licensing allows advisors a more robust suite of products to offer to their clients. Registration, supervision, and continuing education are all requirements for maintaining this type of registration.

Conflicts that may arise for holding this type of license would be in cross-selling. Such a conflict could be selling out of an advisory account and buying in a securities account and thereby generating a commission for the representative. Other conflicts that could occur would be moving monies from an advisory account into a commission account to affect a commissionable trade.

The types of commissions that may be earned on these types of accounts/products could be any one of the following:

- Mutual Fund 12b-1 commissions
- Mutual Funds Trail Commissions
- Direct Product Sponsor Commissions

**Other investment-related business**

Licensed as an insurance representative allows the advisor to offer various insurance products such as Variable Annuities, Life Insurance, and Long-Term Care insurance. Typically, these products generate commission payments to the representatives selling the products. The ability to offer these products to clients allows the advisor a much more robust suite of products and thereby providing the client with a much more comprehensive financial plan.

**B. Non-Investment-Related Activities**

David John Levorchick 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**

David John Levorchick does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## **Item 6 Supervision**

**Supervisor:** Emily Donaldson

**Title:** Designated Supervisor

**Phone Number:** 703-657-6074

In addition to an annual review of our Firm's policies and procedures, each advisor is supervised with the following ongoing review:

- a. Daily trade reviews
- b. Monthly review of personal securities accounts
- c. Monthly review of business bank statements of DBAs
- d. Monthly correspondence reviews - including ongoing capture and review of email
- e. Periodic reviews of client account activity.