

Part 2B of Form ADV: *Brochure Supplement*

DBA:



John M. Bay, CFA®

Winchester, Massachusetts
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Spire Wealth Management

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McLean, VA 22102

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This brochure supplement provides information about John Bay 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 John Bay is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Full Legal Name: John M. Bay

Born: 1986

Education: Bates College, Bachelor of Science, Economics, 2009.

UCLA Anderson, Masters in Business Administration, Accounting and Management, 2017.

Chartered Financial Institute, Chartered Financial Analyst (CFA®), 2013.

Business Experience

Kaizen Wealth Strategies; Senior Wealth Manager and Chief Investment Officer, March 2025 to Present.

M3 Advisory Group; Financial Advisor, January 2025 to February 2025.

M3 Family Office (dba of M3 Advisory Group); Chief Investment Officer, December 2023 to December 2024.

New Edge Advisors; Senior Portfolio Manager, March 2021 to December 2023.

Pallas Capital Advisors; Senior Portfolio Manager, June 2019 to January 2021.

Item 3 Disciplinary Information

John Bay has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

John Bay has no additional investment-related activities.

B. Non-Investment-Related Activities

John Bay 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

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

Item 6 Supervision

Supervisor: Andrew Baron

Title: Designated Supervisor

Phone Number: 703-657-6072

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.