

*This brochure supplement provides information about John Damion Boyd that supplements the MDRN Wealth LLC brochure. You should have received a copy of that brochure. Please contact John Damion Boyd if you did not receive MDRN Wealth LLC's brochure or if you have any questions about the contents of this supplement.*

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

## **MDRN Wealth LLC**

### **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

### **John Damion Boyd**

Personal CRD Number: 6810394

Investment Adviser Representative

MDRN Wealth LLC  
9375 E Shea Blvd Ste 100  
Scottsdale, AZ 85260  
(480) 901-0612  
[john.boyd@mdrnwealth.com](mailto:john.boyd@mdrnwealth.com)

UPDATED: 10/31/2022

## Item 2: Educational Background and Business Experience

**Name:** John Damion Boyd

**Born:** 1995

### **Educational Background and Professional Designations:**

#### **Education:**

BA Economics, Fordham University - 2017

#### **Designations:**

##### **CFP® - Certified Financial Planner**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- ii. Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Business Background:**

08/2022 - Present	Founder and Chief Compliance Officer MDRN Wealth LLC
03/2022 - 06/2022	Financial Consultant Fidelity Brokerage Services LLC
06/2017 - 03/2022	Sr Manager, Private Client Advisor Charles Schwab & Co Inc.
01/2015 - 06/2017	Student Fordham University
08/2013 - 12/2014	Student Southwestern College
08/2012 - 08/2013	Student Valhalla High School

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

There are no legal or disciplinary events that are material to a client’s or prospective client’s evaluation of this advisory business.

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

John Damion Boyd is a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. He will not sell insurance products to his investment advisory clients with MDRN Wealth LLC. MDRN Wealth LLC always acts in the best interest of the client.

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

John Damion Boyd does not receive any economic benefit from any person, company, or organization, other than MDRN Wealth LLC in exchange for providing clients advisory services through MDRN Wealth LLC.

### **Item 6: Supervision**

As the Chief Compliance Officer of MDRN Wealth LLC, John Damion Boyd supervises all activities of the firm. John Damion Boyd's contact information is (480) 901-0612. John Damion Boyd adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

## Item 7: Requirements For State Registered Advisers

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

A. John Damion Boyd has NOT been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.

B. John Damion Boyd has NOT been the subject of a bankruptcy.