



## **Form ADV Part 2B – Brochure Supplement**

**for**

**Danny Allizadeh, ChFC®  
Financial Advisor**

**Position Wealth LLC**  
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(281) 968-2780 | [www.positionwealth.com](http://www.positionwealth.com)

**Effective: March 6, 2023**

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Danny Allizadeh (CRD# 3132836) in addition to the information contained in the Position Wealth (CRD# 325116) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the Position Wealth Disclosure Brochure or this Brochure Supplement, please contact us at (281) 968-2780.

Additional information about Danny Allizadeh is available on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD# 3132836.

## **Item 2 – Educational Background and Business Experience**

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Danny Allizadeh, born in 1976, is dedicated to advising Clients of Position Wealth as a Financial Advisor. Mr. Allizadeh graduated from the University of California at Berkeley in 1997. Additional information regarding Mr. Allizadeh's employment history is included below.

### **Employment History:**

Investment Advisor Representative, Position Wealth LLC	2/2023 to Present
Investment Advisor Representative, TCWP LLC dba Position Wealth	9/2019 to 5/2023
Financial Advisor, Merrill Lynch	4/2010 to 9/2019
Registered Representative, AXA Advisors	10/2009 to 4/2019

### Chartered Financial Consultant™ (“ChFC®”)

The Chartered Financial Consultant™ (ChFC®) program prepares you to meet the advanced financial planning needs of individuals, professionals, and small business owners. You'll gain a sustainable advantage in this competitive field with in-depth coverage of the key financial planning disciplines, including insurance, income taxation, retirement planning, investments, and estate planning. The ChFC® requires three years of full-time, relevant business experience, nine two-hour course-specific proctored exams, and 30 hours of continuing education every two years. Holders of the ChFC® designation must adhere to The American College's Code of Ethics.

## **Item 3 – Disciplinary Information**

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***There are no legal, civil or disciplinary events to disclose regarding Mr. Allizadeh.*** Mr. Allizadeh has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Allizadeh.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Allizadeh.***

However, we do encourage you to independently view the background of Mr. Allizadeh on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his full name or his Individual CRD# 3132836.

## **Item 4 – Other Business Activities**

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### **Insurance Agency Affiliations**

Mr. Allizadeh is a licensed insurance professional. Implementations of insurance recommendations are separate and apart from Mr. Allizadeh's role with Position Wealth. As an insurance professional, Mr. Allizadeh will receive customary commissions and other related revenues from the various insurance companies whose products are sold. Commissions generated by insurance sales do not offset regular advisory fees. This may cause a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Allizadeh.

### **Other Affiliations**

Allizadeh and Marger Capital LLC, owner of Position Wealth, is also 100% owner of Position Insurance LLC and Position Property LLC. The managing members and principal owners of Allizadeh and Marger Capital LLC are Danny Allizadeh and Cary Marger.

## **Item 5 – Additional Compensation**

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Mr. Allizadeh has additional business activities where compensation is received that are detailed in Item 4 above.

Mr. Allizadeh receives compensation for providing investment advisory services that is primarily based on a percentage of fees charged on assets under management for investment management services.

## **Item 6 – Supervision**

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Mr. Allizadeh serves as an Investment Advisor Representative of Position Wealth and is supervised by Cary Marger, Chief Compliance Officer. Mr. Marger can be reached at (281)968-5606

Position Wealth has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of Position Wealth. Further, Position Wealth is subject to regulatory oversight by various agencies. These agencies require registration by Position Wealth and its Supervised Persons. As a registered entity, Position Wealth is subject to examinations by regulators, which may be announced or unannounced. Position Wealth is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.