



# BOYD WEALTH MANAGEMENT

## **Mark J. Patzer**

Boyd Wealth Management, LLC

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This brochure supplement provides information about Mark Patzer that supplements our brochure. You should have received a copy of that brochure. Please contact Kait Garlick if you did not receive Boyd Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mark Patzer is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #6557000.

## **Item 2: Educational Background & Business Experience**

**Mark J. Patzer**

**Year of Birth:** 1989

### **Educational Background:**

- 2013: California State University – San Diego; Bachelor’s Degrees in International Relations & Conflict Resolution, Business, and Chinese

### **Business Background:**

- 04/2019 – Present Investment Adviser Representative Boyd Wealth Management, LLC
- 03/2019 – Present Associate Advisor Boyd Wealth Management
- 10/2016 – 08/2018 Advisory Assistant First Allied Securities
- 09/2015 – 10/2016 Insurance Agent, Associate Advisor Phase Four Financial Solutions
- 02/2016 – 10/2016 Financial Advisor Independent Financial Group
- 12/2014 – 09/2015 Insurance Agent Bankers Life
- 06/2013 – 08/2015 Sales Rep Evolution Fresh
- 08/2007 – 06/2013 Student San Diego State University

### **Exams, Licenses & Other Professional Designations:**

- 2016: Series 7 & 66 Exams
- 2017: Insurance Licensed

**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**

Mark Patzer Mark Patzer is a silent partner at Visual Display Specialists, a CCTV monitor distributor & sales. He started this activity in January 2017.

**Item 5: Additional Compensation**

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

**Item 6: Supervision**

As a representative of Boyd Wealth Management, LLC, Mark Patzer is supervised by Kait Garlick, the firm's Chief Compliance Officer. Kait Garlick is responsible for ensuring that Mark Patzer adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Kait Garlick is (916) 367-0578.