

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
February 2021**

**David Howard Glotzer**



**2150 Shattuck Avenue, Suite 700  
Berkeley, CA 94704  
<https://mindful.money/>**

**Firm Contact:  
Gail Lieberman  
Chief Compliance Officer**

**This brochure supplement provides information about Mr. Glotzer that supplements our brochure. You should have received a copy of that brochure. Please contact Ms. Lieberman if you did not receive DeYoe Wealth Management, Inc. dba Mindful Money's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Glotzer is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD # 2735340.**

## Item 2: Educational Background & Business Experience

**David Howard Glotzer**

**Year of Birth:** 1948

### **Educational Background:**

Mr. Glotzer attended Columbia University and the University of Massachusetts Amherst between 1965 and 1972.

### **Business Background:**

- 11/2014 – Present DeYoe Wealth Management, Inc dba Mindful Money; Wealth Adviser Representative
- 11/2014 – 03/2018 LPL Financial, LLC dba DeYoe Wealth Management; Registered Representative
- 08/2010 – 10/2014 City National Bank; Private Client Advisor
- 06/2003 – 07/2010 MBSC, LLC; Mass Transfer
- 06/1996 – 07/2010 Mellon Corporation; VP Business Development

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

- 2013: Series 7 & 66 Exams
- 2013: CA Insurance License
- 1996: Series 65 Exam

## Item 3: Disciplinary Information

There are no legal or disciplinary events material to your evaluation of Mr. Glotzer.

## Item 4: Other Business Activities

Mr. Glotzer does not have any outside business activities to report.

## Item 5: Additional Compensation

Mr. Glotzer does not receive any other economic benefit for providing advisory services in addition to advisory fees.

## Item 6: Supervision

Gail Lieberman supervises and monitors Mr. Glotzer's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. Lieberman if you have any questions about Mr. Glotzer's brochure supplement at 510-848-0012.