



David Levy, CFP®

2200 Concord Pike, Suite 104
Wilmington, DE 19803
302-765-3500

www.diversifiedllc.com

October 1, 2021

This brochure supplement provides information about David Levy investment advisory representative of Diversified, LLC. This brochure is meant to supplement the Diversified, LLC firm brochure, a copy of which you should have received. Please contact David Levy, Chief Compliance Officer, if you did not receive the Diversified, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about David Levy (CRD 5356917) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

David Levy, CFP®

David began working with Diversified, LLC as an intern in 2007, and became a full-time Financial Advisor in 2008. He is currently a Partner in the firm, and he serves as the firm's Chief Compliance Officer. David has also been a registered representative of Purshe Kaplan Sterling Investments, Inc. since 2020, and was a registered representative with Securities Service Network, Inc. from 2013 to 2020 and Signator Investors, Inc. from 2007 - 2013. David, born in 1985, is a 2007 graduate of the University of Delaware, where he earned a Bachelor of Science degree in Leadership. He holds his Life and Health insurance license and securities licenses, and he earned the Certified Financial Planner™ designation (CFP®) in 2011 from the College for Financial Planning in Denver, Colorado. The CFP® is conferred by the Certified Financial Planner Board of Standards, Inc. after candidates have met all of the requirements for certification. Those requirements include having completed a Board-Registered educational program, having at least three years of qualifying work experience in the personal financial planning area, and passing the CFP® Certification Examination. The exam, which is administered over two days, tests a financial planner's ability to apply his or her knowledge to specific client situations. Individuals who become certified must 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 the right to continue to use the CFP® marks.

Item 3 Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. There are no applicable disclosures to report for David Levy.

Item 4 Other Business Activities

While serving as a Financial Advisor, Diversified, LLC is David's primary business activity that takes up the vast majority of his business time, David is also engaged in other business activities. David is a registered representative of Purshe Kaplan Sterling Investments, Inc., an unaffiliated registered broker/dealer and registered investment advisor. In this capacity, David may affect securities transactions for clients for which he may receive separate, yet customary compensation. The receipt of commissions gives David an incentive to recommend securities products based on the compensation earned rather than the client's needs. However, David endeavors to put client interests first and foremost when making recommendations. Clients always have the option of declining any investment recommendation made by David, and they may affect transactions with firms or representatives of their choice. However, if clients elect to transact recommendations with firms or agents other than those recommended by David, he may be unable to provide investment advisory services for those investments.

David is also licensed as an insurance agent with various insurance companies. If clients purchase non-variable insurance products from David, he may receive separate, yet customary compensation in the form of an insurance commission. If clients purchase variable insurance products from David, such transactions will be processed through Purshe Kaplan Sterling Financial, and he may receive separate compensation as an insurance agent and registered representative.

While David always endeavors to put clients' interests first and foremost, clients should be aware that the receipt of additional compensation itself creates a conflict of interest for David when making insurance recommendations. To address the potential for a conflict of interest, David makes certain to disclose to clients, any fees or compensation associated with recommended insurance products.

Clients are provided with applicable product offering materials that discuss the fees associated with the applicable product. Clients are also asked to sign applicable disclosure documents and applications that point out important product features and fees.

Item 5 Additional Compensation

As noted in Item 4 above, David is a registered representative of Purshe Kaplan Sterling Investments, Inc. ("PKS"). As such, he may be compensated for his activities with that firm. As a registered representative, David may receive securities commissions for transactions executed through PKS in its capacity as a broker/dealer. This compensation is separate and apart from the compensation earned from Diversified, LLC. David also earns compensation as an insurance agent, as disclosed in Item 4 above.

While David always endeavors to put his clients' interests first and foremost, clients should be aware that the receipt of additional compensation itself creates a conflict of interest when making investment or insurance recommendations. To address the potential for a conflict of interest, David makes certain to disclose to clients, any fees or compensation associated with recommended investment or insurance products. Clients are provided with applicable product prospectuses and offering materials, which discuss the fees associated with the applicable products. Clients are also asked to sign applicable disclosure documents that point out important product features and fees.

As a fiduciary, David makes product recommendations that he feels are in his clients' best interest and are based on the specific needs and objectives of the client, not the compensation potential of the product.

Item 6 Supervision

Diversified, LLC has appointed a Chief Compliance Officer who is responsible for the overall supervision of the firm. The Chief Compliance Officer is David Levy. Mr. Levy implements policies and procedures to ensure compliance with industry rules and regulations. He maintains required books and records to monitor the investment advice and recommendations made on behalf of the firm. Diversified, LLC has a specific Code of Ethics that applies to all employees. Mr. Levy implements procedures to ensure employees comply with the firm's Code of Ethics, and he monitors all reports provided pursuant to the Code. Mr. Levy is located in the Diversified, LLC main office in Wilmington, DE, and he can be reached at 302-765-3500.