



David Levy, CFP®

3705 Concord Pike
Wilmington, DE 19803
302-765-3500

www.diversifiedllc.com

August 5, 2024

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 was a registered representative of Purshe Kaplan Sterling Investments, Inc. from 2020 until October 2022, 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 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.

David is also an owner of Diversified Tax, LLC and Diversified Insurance, LLC, both affiliated entities of Diversified, LLC. David receives revenue from these entities, as an owner, and clients may be referred to these entities for their applicable business offerings.

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 recommendations to purchase insurance or engage an affiliated entity. 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 or services. If applicable, Clients are provided with product offering materials that discuss the fees associated with the applicable product or service. Clients are also asked to sign applicable disclosure documents and applications that point out important product or service features and fees.

Item 5 Additional Compensation

As noted in Item 4 above, David also earns compensation as an insurance agent, and as an owner of Diversified Tax, LLC and Diversified Insurance, LLC, affiliates of Diversified, LLC.

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 recommendations for these other products or services. To address the potential for a conflict of interest, David makes certain to disclose to clients, any fees or compensation associated with recommended products or services. 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.