

**Part 2B of Form ADV: *Brochure Supplement***

Gerald P Hebert  
1819 W. Pinhook Rd., #209  
Lafayette, LA 70508  
337-237-3022

Spire Wealth Management, LLC  
7901 Jones Branch Dr., #810  
McLean, VA 22102

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This brochure supplement provides information about Gerald P Hebert that supplements the Spire Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Sue McKeown 703-657-6060 if you did not receive Spire Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Gerald P Hebert is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

**Full Legal Name:** Gerald P Hebert      **Born:** 1989

### **Education**

- University of Louisiana; BS, Finance; 2011
- University of Louisiana ; MBA; 2014

### **Business Experience**

- Spire Lafayette; Wealth Manager; from 03/2018 to Present
- Spire Lafayette; Business Development; from 9/2017 to 02/2018
- Patriot Services Corp; Account Manager; from 11/2015 to 10/2016

### **Practice Management**

A consultation is set with the client where I obtain their financial objectives. I then use Riskalyze to obtain their risk/volatility score and then consult with them on creating a portfolio based on those same financial objectives. I then create a diverse portfolio that best compliments their risk scores. If they reach the financial minimums and risk level, I will add in the strategies of a separate account manager, Corbett Road. as well.

Performance of my client portfolios are measured and reported using Envestnet.

Portfolios are reviewed with clients at least annually.

## **Item 3 Disciplinary Information**

Gerald P Hebert has no reportable disciplinary history.

## **Item 4 Other Business Activities**

### **A. Investment-Related Activities**

1. Gerald P Hebert is not engaged in any other investment-related activities.

2. Gerald P Hebert does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

### **B. Non Investment-Related Activities**

Gerald P Hebert, as a licensed insurance agent, is able to offer insurance products to his clients. Mr. Hebert receives commissions on these insurance products separate from his investment advisory services.

## **Item 5 Additional Compensation**

Gerald P Hebert does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## **Item 6 Supervision**

**Supervisor:** Sonya Logan

**Title:** Designated Supervisor

**Phone Number:** 703-657-6064

In addition to an annual in person review of our firms policies and procedures, each advisor is subject to the following ongoing supervision and review:

Daily trade reviews

Monthly review of personal securities accounts

Monthly correspondence reviews - including ongoing capture and review of email

Periodic reviews of client account activity