

Item 1 – Cover Page

Lesjak Planning, LLC

1991 Crocker Road
Suite #575
Westlake, OH 44145
440-871-9500

www.lesjakplanning.com

**PART 2B OF FORM ADV
BROCHURE SUPPLEMENT**

DAVID M. LESJAK

Dated: 3-27-2024

This brochure supplement provides information about **David M. Lesjak** that supplements the **Lesjak Planning, LLC** brochure. You should have received a copy of that brochure. Please contact **Marc C. Thomas** if you did not receive **Lesjak Planning, LLC**'s brochure or if you have any questions about the contents of this supplement.

Additional information about **David M. Lesjak** also is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

David M. Lesjak, born in 1957, is a Certified Financial Planner with Lesjak Planning. He is a graduate of the College of Financial Planning, Denver, Colorado, where he received a degree as a Certified Financial Planner. Mr. David Lesjak was President of LP from 1995 to 2018. Prior to becoming President, he was Vice President since starting the firm in 1980.

The Certified Financial Planner Designation requires an undergraduate degree, successfully passing a Certification Exam and a minimum of three years qualifying full-time work experience.

Item 3 – Disciplinary Information

There are no legal or disciplinary events to disclose for **David M. Lesjak**.

Item 4 – Other Business Activities

Not applicable to **David M. Lesjak**.

Item 5 – Additional Compensation

Not applicable to **David M. Lesjak**.

Item 6 – Supervision

Each year **David M. Lesjak** is required to review LP's Compliance Program, Procedures, and Code of Ethics. A signature is required each year as an affirmative acknowledgement to adhere to such policies and procedures.

Item 7 – Requirements for State-Registered Advisors

Not applicable to **David M. Lesjak**.

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MICHAEL J. LESJAK

Dated: 3-27-2024

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Additional information about **Michael J. Lesjak** also is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Michael J. Lesjak, born in 1960, is the President and a Director of Lesjak Planning. He is a graduate of the College of Financial Planning, Denver, Colorado, where he received a degree as a Certified Financial Planner. Prior to becoming President in 2018, Mr. Michael Lesjak was Vice President of LP since 1995 and a Director since 1987. Prior to becoming Vice President, he was Secretary since joining the firm in 1987.

The Certified Financial Planner Designation requires an undergraduate degree, successfully passing a Certification Exam and a minimum of three years qualifying full-time work experience.

Item 3 – Disciplinary Information

There are no legal or disciplinary events to disclose for **Michael J. Lesjak**.

Item 4 – Other Business Activities

Not applicable to **Michael J. Lesjak**.

Item 5 – Additional Compensation

Not applicable to **Michael J. Lesjak**.

Item 6 – Supervision

Each year **Michael J. Lesjak** is required to review LP's Compliance Program, Procedures, and Code of Ethics. A signature is required each year as an affirmative acknowledgement to adhere to such policies and procedures.

Item 7 – Requirements for State-Registered Advisors

Not applicable to **Michael J. Lesjak**.

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NATHAN R. GIST

Dated: 3-27-2024

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Additional information about **Nathan R. Gist** also is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Nathan R. Gist, born in 1980, is a Certified Financial Planner and joined Lesjak Planning in July of 2002. He earned his Certified Financial Planner Designation in August 2005. He has a BS in Finance from The Ohio State University. Nathan has served as Secretary to the firm since 2020.

The Certified Financial Planner Designation requires an undergraduate degree, successfully passing a Certification Exam and a minimum of three years qualifying full-time work experience.

Item 3 – Disciplinary Information

There are no legal or disciplinary events to disclose for **Nathan R. Gist**.

Item 4 – Other Business Activities

Not applicable to **Nathan R. Gist**.

Item 5 – Additional Compensation

Not applicable to **Nathan R. Gist**.

Item 6 – Supervision

Each year **Nathan R. Gist** is required to review LP's Compliance Program, Procedures, and Code of Ethics. A signature is required each year as an affirmative acknowledgement to adhere to such policies and procedures.

Item 7 – Requirements for State-Registered Advisors

Not applicable to **Nathan R. Gist**.

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MARC C. THOMAS

Dated: 3-27-2024

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Additional information about **Marc C. Thomas** also is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Marc C. Thomas, born in 1974, is a Certified Financial Planner, Certified Private Wealth Advisor and joined LP in July of 1999. He earned his Certified Financial Planner Designation in July of 2002 and earned his Certified Private Wealth Advisor Certification in 2022. He has been the Chief Compliance Officer since 2004 and the Vice President since 2018. His degrees include both a BS in Finance and MBA in Finance from the University of Akron, Ohio.

The Certified Financial Planner Designation requires an undergraduate degree, successfully passing a Certification Exam and a minimum of three years qualifying full-time work experience.

The CPWA designation signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for the professional designation, which is centered on private wealth management topics and strategies for high-net-worth clients. Prerequisites for the CPWA designation are: a Bachelor's degree from an accredited college or university or one of the following designations or licenses: CIMA®, CIMC®, CFA®, CFP®, ChFC®, or CPA license; have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements and five years of experience in financial services or delivering services to high-net-worth clients. CPWA designees have completed a rigorous educational process that includes executive education requirements and successful completion of a comprehensive examination. CPWA designees are required to adhere to the Investments & Wealth Institute *Code of Professional Responsibility and Rules and Guidelines for Use of the Marks*. The designation is administered through the Investments & Wealth Institute.

Item 3 – Disciplinary Information

There are no legal or disciplinary events to disclose for **Marc C. Thomas**.

Item 4 – Other Business Activities

Not applicable to **Marc C. Thomas**.

Item 5 – Additional Compensation

Not applicable to **Marc C. Thomas**.

Item 6 – Supervision

Each year **Marc C. Thomas** is required to review LP's Compliance Program, Procedures, and Code of Ethics. A signature is required each year as an affirmative acknowledgement to adhere to such policies and procedures.

Item 7 – Requirements for State-Registered Advisors

Not applicable to **Marc C. Thomas**.

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KEVIN M. LESJAK

Dated: 3-27-2024

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Additional information about **Kevin M. Lesjak** also is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Kevin M. Lesjak, born in 1990, is a Certified Financial Planner and joined Lesjak Planning in January of 2012. He earned his Certified Financial Planner Designation in August of 2018. He has a BS in Business from The University of Phoenix.

The Certified Financial Planner Designation requires an undergraduate degree, successfully passing a Certification Exam and a minimum of three years qualifying full-time work experience.

Item 3 – Disciplinary Information

There are no legal or disciplinary events to disclose for **Kevin M. Lesjak**.

Item 4 – Other Business Activities

Not applicable to **Kevin M. Lesjak**.

Item 5 – Additional Compensation

Not applicable to **Kevin M. Lesjak**.

Item 6 – Supervision

Each year **Kevin M. Lesjak** is required to review LP's Compliance Program, Procedures, and Code of Ethics. A signature is required each year as an affirmative acknowledgement to adhere to such policies and procedures.

Item 7 – Requirements for State-Registered Advisors

Not applicable to **Kevin M. Lesjak**.