

**Item 1 – Cover Page**

**Lesjak Planning, LLC**

1991 Crocker Road  
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440-871-9500

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[www.lesjakplanning.com](http://www.lesjakplanning.com)

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

**DAVID M. LESJAK**

**Dated: 3-16-2017**

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](http://www.adviserinfo.sec.gov).

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

**David M. Lesjak**, born in 1957, is the President and a Director of LP. 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 has been the President of LP since 1995 and a Director since 1980. 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: 3-16-2017**

This brochure supplement provides information about **Michael J. 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 **Michael J. Lesjak** also is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

**Michael J. Lesjak**, born in 1960, is the Vice President and a Director of LP. He is a graduate of the College of Financial Planning, Denver, Colorado, where he received a degree as a Certified Financial Planner. Mr. Michael Lesjak has been the 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: 3-16-2017**

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Additional information about **Nathan R. Gist** also is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

**Nathan R. Gist**, born in 1980, is a Certified Financial Planner and joined LP 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.

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: 3-16-2017**

This brochure supplement provides information about **Marc C. Thomas** that supplements the **Lesjak Planning, LLC** brochure. You should have received a copy of that brochure. Please contact **David M. Lesjak** 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 **Marc C. Thomas** also is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

**Marc C. Thomas**, born in 1974, is a Certified Financial Planner and joined LP in July of 1999. He earned his Certified Financial Planner Designation in July of 2002. Mr. Marc Thomas has been the Chief Compliance Officer since 2004 and the Chief Operating Officer since 2016. 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.

## **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**.