

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

White Lighthouse Investment Management Inc. – Head Office  
(Previously known as White Lighthouse Investment Management and  
JJK Investment Management)

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This brochure supplement provides information about John Wanvig that supplements the White Lighthouse Investment Management Inc. ADV brochure. You should have received a copy of that brochure. Please contact John Wanvig at +41 79 952 5182 if you did not receive White Lighthouse Investment Management Inc.'s ADV brochure or if you have any questions about the contents of this supplement.

Additional information about John Wanvig and White Lighthouse Investment Management is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Educational Background and Business Experience**

John Wanvig – Born 1961

### **Education:**

MBA – Harvard University – Harvard Business School 1988

BA – Economics – Cornell University 1984

Certificate in Financial Planning – Kaplan University 2016

### **Business Experience:**

Financial Planner – White Lighthouse Investment Management  
Lausanne, Switzerland 2016 – present

Vice President, Regional Director – General Mills Inc. (CPW: Cereal Partners Worldwide)  
Lausanne, Switzerland 1988 – 2015

Analyst – Prudential-Bache Securities: New York, New York, USA 1984 – 1986

John Wanvig is a Certified Financial Planner with White Lighthouse Investment Management Inc. The Certified Financial Planner™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by the Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. CFP® Professionals are held to a fiduciary standard which requires them to act in their clients’ best interests. Currently, more than 98,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

**Education** – Complete college or university-level coursework through a CFP Board Registered Program and become well-versed in these Principal Knowledge Topics: Professional Conduct and Regulation, General Principles of Financial Planning, Risk Management and Insurance Planning, Investment Planning, Tax Planning, Retirement Savings and Income Planning, Estate Planning, Psychology of Financial Planning, Financial Plan Development.

**Examination** – Pass the comprehensive CFP® Certification Examination. The CFP® exam is a 170-question, multiple-choice test addressing areas included in the Principal Knowledge Topics listed above. The test consists of two 3-hour sections which include stand-alone questions, short scenario questions and case studies designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances.

**Experience** – Complete at least 6,000 hours of financial planning-related experience.

**Ethics** – Commit to the CFP Board to act as a fiduciary, submit to a detailed background check, and agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct, which include an expanded scope of the fiduciary duty standard for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

**Continuing Education** – Complete 30 hours of continuing education hours every two years, including 2 hours on the Code of Ethics and 28 hours on other parts of the Code of Ethics and Standards of Conduct in order to introduce or review the competencies and knowledge that enhances the performance of CFP® professionals.

**Ethics** – Complete a pre-approved 2-hour CFP Board Ethics program that is specific to CFP® Certification.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Disciplinary Information**

There have been no disciplinary events against John Wanvig.

## **Other Business Activities**

John has advised start-up companies over the last several years including Secret Stop, Stem coffee and several in the ecosystem of EPFL University: Future Instruments, Qloud Lab, and Morphodyne. John may work with other start-ups in the future.

John is also an advisor/mentor in the PROCAT ecosystem of Professional Catalans in Switzerland. He has advised several entrepreneurs since 2019 and plans to continue, as a mentor, to help them grow their business ideas. He may be involved with others in the future.

John also works part-time at White Lighthouse Investment Management SARL, with an office in Lausanne, Switzerland. He is a Certified Financial Planner, Compliance Associate, and Director for the company. He works closely with the firm's Owner and Managing Director, Jonathan Lachowitz, to provide support in discretionary investment management for White Lighthouse Investment Management SARL clients and to assist with all Swiss regulatory and legal requirements.

## **Additional Compensation**

No additional compensation is received. Compensation is only received directly from clients.

## **Supervision**

As an employee of White Lighthouse Investment Management Inc., John is responsible for serving his clients and abides by the firm's Code of Conduct, which mirrors the CFP Board's Standards of Conduct. He is monitored by the Chief Compliance Officer (CCO), Kathleen Quintero, and supervised by Jonathan Lachowitz, the firm's owner.

John Wanvig abides by the firm's code of ethics which is also inclusive of the CFP Board's code of ethics.

## **Requirements for State-Registered Advisors**

John Wanvig has never been found liable in any arbitration claim alleging damages in excess of \$2500 (or any amount) involving: investments, investment-related activities, fraud, false statements, omissions, theft, embezzlement, wrongfully taking property, bribery, forgery, counterfeiting, extortion, or dishonest, unfair, or unethical practices or for any other matter.

John Wanvig has never been found liable in any civil, self-regulatory organization of administrative proceeding involving investments, investment-related activities, fraud, false statements, omissions, theft, embezzlement, wrongfully taking property, bribery, forgery, counterfeiting, extortion, or dishonest, unfair, or unethical practices, or for any other matter.

John Wanvig has never been the subject of a bankruptcy petition.