

This brochure supplement provides information about Beverly Deloris Johnson that supplements the BDJ Wealth Management LLC brochure. You should have received a copy of that brochure. Please contact Beverly Deloris Johnson if you did not receive BDJ Wealth Management LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Beverly Deloris Johnson is also available on the SEC's website www.adviserinfo.sec.gov.



BDJ Wealth Management LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Beverly Deloris Johnson

Personal CRD Number: 6285946

Investment Adviser Representative

March 11, 2024

Mailing and Meeting

Address:

BDJ Wealth

Management LLC

17766 Preston Road

Dallas, Texas 75252

469-619-9525

BDJWealth@pjsservicesgroup.com

Item 2: Educational Background and Business Experience

Name: Beverly Deloris Johnson

Born: 1964

Educational Background and Professional Designations:

Education:

MS Personal Financial Planning, Texas Tech University - 2016

Certification in Charitable Planning, Texas Tech University - 2014

MBA Business, Northwestern University - 2000

MS Engineering, Missouri University of Science & Technology - 1995

BS Engineering, US Military Academy - 1986

Business Background:

05/2020 - Present	Investment Advisor Representative BDJ Wealth Management, LLC
10/2015 - Present	Business & Tax Services Partner PJS Services, LLC
07/2014 - Present	Owner, Consultant Teach Them 2 Fish
01/2010 - 05/2014	Doctoral Student Texas Tech University
07/2015 - 05/2020	Investment Adviser Representative SOFOS Investments, Inc.
01/2015 - 08/2017	CFP Certification Continuing Education Instructor SMU Certification Program
08/2014 - 08/2017	Personal Finance Adjunct Instructor Paul Quinn College
01/2014 - 07/2015	Investment Adviser Representative Murphy & Sylvest
08/2008 - 07/2014	Instructor: Personal Finance, Marketing, Leadership Winston Salem State University

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Beverly Deloris Johnson is involved in the Outside Business Activities listed below:

10/01/2015 – Present: Beverly Deloris Johnson is a partner at PJS Services, LLC where she is involved with Business Development, Tax Filing, and Tax Planning services. She receives \$15,000 per year in compensation with 5 to 10 hours dedicated to this activity per month.

07/01/2014 – Present: Beverly Deloris Johnson is the owner of Teach Them 2 Fish where she is involved in Financial Education, Consulting, and Advising as a Consultant. She receives compensation for these services based on a client contract with 5 to 10 hours dedicated to this activity per month.

These activities represent a conflict of interest because Ms. Johnson's time will not be focused entirely on her activities for BDJ Wealth Management LLC and its clients.

Additionally, Ms. Johnson is licensed with the Texas Department of Insurance. She can offer fixed insurance products for which she will receive commissions from the insurance companies through an independent insurance agency.

Investment adviser representatives who offers fee based and commission-based products are subject to a conflict of interest. It is a conflict of interest because it provides an incentive to recommend products based on the commissions. We mitigate this conflict by disclosing the relationship to our clients, by conducting our operations in accordance with our fiduciary duty and by following our firm's code of ethics.

Please note: The independent insurance agencies pay commissions fees directly to Ms. Johnson. BDJW does not receive a portion of these commissions. Clients have the option to purchase investment products that we recommend through other broker-dealers, advisers or agents that are not affiliated with BDJW.

Item 5: Additional Compensation

Beverly Deloris Johnson does not receive any economic benefit from any person, company, or organization, in exchange for providing clients with advisory services at BDJ Wealth Management LLC.

Item 6: Supervision

Beverly Deloris Johnson is the sole owner and investment adviser representative of BDJ Wealth Management LLC and is therefore not supervised by another person. Beverly Deloris Johnson adheres to required regulations regarding her activities as an Investment Adviser Representative and follows policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements. Beverly Deloris Johnson's contact information is on the cover page of this disclosure document.

Item 7: Requirements For State Registered Advisers

- A. Beverly Deloris Johnson has **NOT** been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
 2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
- B. Beverly Deloris Johnson has **NOT** been the subject of a bankruptcy petition in the past ten years.