

DST Wealth Management, LLC

John B. Balmer

CRD # 4569902

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Brochure Supplement

September 19, 2021

This brochure supplement provides information about John B. Balmer that supplements the Adviser' brochure. You should have received a copy of that brochure. Please contact Adviser Compliance Department at (858) 449-3545, if you did not receive Adviser' brochure or if you have any questions about the contents of this supplement.

Additional information about John B. Balmer is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background and Business Experience

John B. Balmer
CRD # 4569902

Year of birth: 1974

Formal education:

- Bachelor of Science, California Polytechnic State University, San Luis Obispo

Business background:

- Investment Adviser Representative (IAR), DST Wealth Management, LLC (09/2019 to Present)
- Registered Representative (RR), Benchmark Investments, Inc (02/2020 to Present)
- Owner, ClearSight Wealth Management, Inc. (08/2014 to Present)
- Team Member, Estate Planning Team, (08/2016 to Present)
- Registered Representative (RR) & IAR, Centaurus Financial, Inc. (07/2016 to 09/2019)
- Girard Securities, Inc., RR, (10/2013 to 07/2016)

Item 3: Disciplinary Information

Mr. Balmer has not been the subject of any legal or disciplinary event that is required to be disclosed in this brochure. Additional information about Mr. Balmer may be found at the Investment Advisor Public Disclosure website.

Item 4: Other Business Activities

Mr. John B. Balmer is a team member of the Estate Planning Team.

Estate Planning Team

The Estate Planning Team is a membership-based company that provides administrative, marketing and support services to assist its members in referring clients for various types of estate and tax planning programs for their clients.

IAR's of Adviser are members of the Estate Planning Team. The Estate Planning Team offers a service to qualified clients, certain strategies that may reduce capital gains tax liabilities. This arrangement presents a conflict of interest because it creates an incentive to recommend this service based upon the amount of compensation that Mr. Woolery may receive if you choose to become a client of Estate Planning Team and establish a Deferred Sales Trust TM, which he would be in a position to service and earn a commission and/or a fee, rather than based upon your needs.

Mr. Balmer is also a registered securities representative for Benchmark Investments, Inc. (Benchmark). A relationship where an investment adviser representative (IAR) is also a registered representative of a securities firm creates inherent conflicts of interest. As the result of his affiliation with Benchmark, Mr. Balmer will receive commissions or other compensation from the sale of mutual funds or other products sold to you in his capacity as a broker-dealer registered representative. For example, Mr. Balmer is eligible to be paid 12b-1 fees, which are paid by mutual fund companies for the on-going marketing of their investment products. This additional compensation presents a conflict of interest, because it creates an incentive to recommend certain investments to clients over others that may not offer similar compensation to the IAR.

Mr. Balmer is licensed to sell insurance and does so by holding appointments directly with various insurance companies. Commissions may be earned by Mr. Balmer if insurance products are purchased through these insurance companies.

In these capacities Mr. Balmer may recommend securities, insurance, advisory, or other products, and receive commissions and other compensation if products are purchased through any firms with which Mr. Balmer is affiliated. Thus, a conflict of interest may exist between the interests of Mr. Balmer and those of the advisory clients.

We may receive benefits such as assistance with conferences and educational meetings from product sponsors.

Our advisory representatives may also recommend various asset management firms through their affiliation with Adviser. If you establish an investment advisory relationship with one of these firms, our financial advisors may share in the advisory fees you pay to these asset management firms.

The above arrangements present a conflict of interest because they create an incentive to make recommendations based upon the amount of compensation we receive rather than based upon your needs. We will explain the specific costs associated with any recommended investments with you upon request. Additionally, you have the option to purchase investment and insurance products through other brokers or agents who are not affiliated with us.

Item 5: Additional Compensation

Mr. Balmer does not receive any additional compensation related to the advisory services provided to you. He does receive compensation from his Other Business Activities as disclosed in Item 4 above.

Item 6: Supervision

Mr. Balmer is supervised by Edward Woolery, President and CCO of DST Wealth Management. Mr. Woolery can be reached at (858) 449-3545. We supervise Mr. Balmer by requiring that he adhere to our processes and procedures as described in our firm's Compliance Manual and Code of Ethics and through monitoring his activities accordingly.