

## Brochure Supplement

Form ADV Part 2B • April 17, 2017



**Dave A. Isaacson**

*This brochure supplement provides information about Dave A. Isaacson that supplements the Cleary Gull Advisors Inc. (Cleary Gull Advisors) Brochure (Form ADV Part 2A). You should have received a copy of that Brochure. Please contact us at the telephone number listed above if you did not receive Cleary Gull Advisors' Brochure or if you have any questions about the content of this brochure supplement. Additional information about Dave A. Isaacson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

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

Dave Isaacson was born in 1969 and received a Bachelor's degree in Finance from Bob Jones University. Dave currently serves as Portfolio Manager for the firm and for wealth management clients of Johnson Bank, the firm's affiliate. Prior to joining Johnson Bank, Dave served as Senior Vice President and Regional Investment Manager for Wells Fargo for 6 years and US Bank for 17 years. Dave is a member of the firm's Investment Committee and leads the Complements Strategy Group.

### **Item 3 - Disciplinary Information**

None.

### **Item 4 - Other Business Activities**

Dave serves as Vice President and Portfolio Manager in the Wealth Management division of the firm's affiliate, Johnson Bank, which is engaged in, among other services, providing asset management, financial planning, trust advisory and other financial services to clients.

### **Item 5 - Additional Compensation**

Dave is compensated by Johnson Bank and does not receive compensation or economic benefit from Cleary Gull Advisors, or from parties other than Johnson Bank, for providing advisory services. Johnson Bank receives solicitation fees, as permitted by applicable rules and regulations, from Cleary Gull Advisors for client referrals. As an employee of Johnson Bank, Dave participates in its incentive payment program and is compensated for referring new or additional business to the Bank or its affiliates, including Cleary Gull Advisors, as permitted by applicable rules and regulations..

### **Item 6 - Supervision**

Cleary Gull Advisors has developed policies and procedures for monitoring the activities of its supervisory persons, e.g., personal trading, conflicts of interest, and communications with clients. Dave is supervised by Mark Fenlon, Senior Vice President Wealth. Mr. Fenlon can be reached at 414-287-6478.

### **Item 7 - Requirements for State-Registered Advisers**

Not applicable.

