

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

**DBA:**



**David T. Canham IV**

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**Spire Wealth Management**

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This brochure supplement provides information about David T. Canham IV that supplements the Spire Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Spire Compliance at 703-657-6060 if you did not receive Spire Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about David T. Canham IV is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

**Full Legal Name:** David T. Canham IV

**Born:** 1971

### **Education:**

Denison University, Bachelor of Arts, History, 1994.

University of Virginia, McIntire School of Commerce, Certificate, 1995.

University of Pennsylvania/Wharton, Certificate, Endowments & Foundations sponsored by the Investments and Wealth Institute, 2007.

Mr. Canham also holds the Certified Investment Management Analyst (CIMA®) designation, obtained in 2004. The Certified Investment Management Analyst (CIMA®) is a certification for financial consultants and investment advisors. It is issued by an organization called the Investments and Wealth Institute.

### **Business Experience**

- Spire Wealth Management; Senior Wealth Advisor; from July 2020 to Present
- Keel Point Capital; Wealth Advisor; from March 2018 to July 2020
- Merrill Lynch; Wealth Manager; from March 2013 to February 2018
- Deutsche Bank; Financial Associate; from January 2001 to February 2013

## Item 3 Disciplinary Information

David T. Canham IV has no reportable disciplinary history.

## Item 4 Other Business Activities

### **A. Investment-Related Activities**

David T. Canham IV is also engaged in the following investment-related activities:

#### **Registered representative of a broker-dealer**

Advisor also carries the securities licenses required by FINRA (Financial Industry Regulatory Authority) to offer securities products and execute securities transactions separately from their registration as an Investment Advisor Representative providing investment advice. This additional licensing allows advisors a more robust suite of products to offer to their clients. Registration, supervision, and continuing education are all requirements for maintaining this type of registration.

Conflicts that may arise for holding this type of license would be in cross-selling. Such a conflict could be selling out of an advisory account and buying in a securities account and thereby generating a commission for the representative. Other conflicts that could occur would be moving monies from an advisory account into a commission account to affect a commissionable trade.

The types of commissions that may be earned on these types of accounts/products could be any one of the following:

1. Mutual Fund 12b-1 commissions
2. Mutual Funds Trail Commissions
3. Direct Product Sponsor Commissions

**B. Non-Investment-Related Activities**

David T. Canham IV is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

## **Item 5 Additional Compensation**

David T. Canham IV does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## **Item 6 Supervision**

**Supervisor:** Emily Donaldson

**Title:** Designated Supervisor

**Phone Number:** 703-657-6074

In addition to an annual review of our Firm's policies and procedures, each advisor is supervised with the following ongoing review:

- a. Daily trade reviews
- b. Monthly review of personal securities accounts
- c. Monthly review of business bank statements of DBAs
- d. Monthly correspondence reviews - including ongoing capture and review of email
- e. Periodic reviews of client account activity.