

# DAVID R. HEDGES

BOOKMAN BRIGHT, INC.  
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## FIRM SUPPLEMENTAL BROCHURE ADV PART 2B March 15<sup>th</sup>, 2024

This Brochure Supplement provides information about David R. Hedges that supplements the Bookman Bright Inc.'s Brochure. You should have received a copy of that Brochure. Please contact Mr. Hedges at (704) 256-6016 if you did not receive Bookman Bright, Inc.'s Brochure or if you have any questions about the contents of this supplement.

Additional information about David Hedges is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. The CRD number for Mr. Hedges is 2826542.

## Item 2 – Education Background and Business Experience

**David R. Hedges**

**Born:** 1968

### **Education:**

***Bentley University*** – Bachelor of Science in Finance – 1990

***Certified Wealth Strategist*** – 2006

To obtain the CWS® certification one must go through a comprehensive blended approach to learning. The program consists of 4 days of classroom training, months of directed study, video (including textbooks and study guides, e-learning lessons, technical tests) and completion of a final Capstone project. The entire study takes approximately six months to complete. The designation is awarded upon the successful completion of the entire program and passing of the Capstone project. The Certified Wealth Strategist® education and designation are administered by Cannon Financial Institute, in which the CWS® Board of Standards awards to individuals who successfully complete initial and ongoing certification requirements.

### **Business Background:**

***Bookman Bright, Inc.***

- President
- *Affiliated as an Investment Advisor Representative – May 2019 to Present*

***DBA Bookman Bright Retirement Planning & Capital Management and Bookman Bright, Inc.***

- Owner & President
- *Affiliated as an Investment Advisor Representative with Regal Investment Advisors, LLC – September 2012 to May 2019*

***Individually Licensed Life & Health Insurance Agent*** – August 1996 to Present

***David R. Hedges DBA College Bound Financial*** – August 2019 to December 2022

***Bookman Bright Consulting, Inc. DBA Bookman Bright Consulting and DBA Bookman Bright Consulting, Inc.*** – August 2018 to Present

- Owner & President

***Medallion Insurance Services, LLC*** – October 2003 to March 2013

- Member Manager

***DBA Berkeley Wealth Professionals & Berkeley Wealth Professionals, LLC*** – August 2002 to August 2012

- Owner & Managing Member
- *Affiliated as an Investment Advisor Representative with Raymond James Financial Services, Inc – October 2002 to July 2006.*
- *Affiliated as an Investment Advisor Representative with First Allied Securities, Inc. & First Allied Advisory Services, Inc. – July 2006 to September 2012*

***A.G. Edwards & Sons, Inc.***

- Financial Consultant – April 1997 to August 2002

***John Hancock Mutual Life Insurance Co.***

- Sales Agent – July 1996 to April 1997

### Item 3 – Disciplinary History

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that could be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

### Item 4 – Other Business Activities

Mr. Hedges is an independent and individually licensed insurance agent. He owns and operates Bookman Bright Consulting, Inc. dba Bookman Bright Consulting; a tax planning and insurance consulting company. He spends approximately 15% of his time on this activity and may recommend the sale of insurance products and tax planning services to the firm's clients. This other business activity pays Mr. Hedges commissions and fees that are separate from the fees outlined in Item 5 of the firm's Form ADV Part 2A. This is a conflict of interest because the commissions give him a financial incentive to recommend and sell clients insurance products and tax planning services. However, Mr. Hedges attempts to mitigate any conflicts of interest to the best of his ability by placing the client's interests ahead of his own and through his fiduciary duty. Additionally, the client is informed that he or she always has the right to choose whether to act on the recommendation and he or she has the right to purchase recommended insurance products through any licensed agent.

### Item 5 – Additional Compensation

Mr. Hedges does not receive any additional compensation.

### Item 6 – Supervision

Mr. Hedges is the sole principal and Chief Compliance Officer of the firm. As a result, he has no internal supervision placed over him. He is however bound by the Adviser's Code of Ethics.

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

#### Arbitration or Civil, Self-Regulatory Organization or Administrative Proceedings

Mr. Hedges has not been the subject of any arbitration, civil, self-regulatory organization or administrative finding.

#### Bankruptcy History

Mr. Hedges has not been the subject of a bankruptcy petition.

