



AMPLIFY MY WEALTH

Form ADV Part 2A - Firm Brochure.

## **AMPLIFY MY WEALTH LLC**

Boca Raton, FL 33434

Phone: 561-866-2235

Dated: April 1, 2024

[amplifymywealth.com](http://amplifymywealth.com)

This Brochure provides information about the qualifications and business practices of AMPLIFY MY WEALTH LLC, "AMPLIFY." If you have any questions about the contents of this Brochure, please contact us at 561-866-2235. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission or any state securities authority.

AMPLIFY MY WEALTH LLC is registered as an Investment Adviser with the State of FLORIDA. Registration as an Investment Adviser does not imply any level of skill or training. Additional information about AMPLIFY is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov), and you can find it using the firm's identification number, 314949.

## Item 2: Material Changes

The last annual update of this Brochure was filed on March 15, 2024.

Item 5 is updated with this amendment to include modifications for fixed planning fees.

In the future, any material changes made during the year will be reported here.

Form ADV Part 2B Item 2 has been updated to include Alissa Krasner Maizes as a Candidate for CFP® Certification.

From time to time, we may amend this Disclosure Brochure to reflect changes in our business practices, regulations, and routine annual updates as required by the securities regulators. Either this complete Disclosure Brochure or a Summary of Material Changes is given to each Client annually, and if a material change occurs in the business practices of AMPLIFY MY WEALTH LLC.

At any time, you may view the current Disclosure Brochure online at the SEC's Investment Adviser Public Disclosure website at <http://www.adviserinfo.sec.gov> by searching for our firm name or CRD number 314949.

You may also request a copy of this Disclosure Brochure by contacting us at 561-866-2235.

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# Item 4: Advisory Business

## Description of Advisory Firm

AMPLIFY MY WEALTH LLC is registered as an investment adviser with the State of FLORIDA, founded in March 2021 of legal formation. ALISSA KRASNER MAIZES is the Principal Owner and Chief Compliance Officer of AMPLIFY. AMPLIFY reports no discretionary or non-discretionary assets under management since formation.

AMPLIFY does not sell insurance or annuity products or receive commissions or referral fees. As a fiduciary, AMPLIFY tailors and customizes our advisory services to the individual needs of our clients, always putting the client's needs first. We consider their goals, risk tolerance, and other information gleaned from what the client shares when meeting and any information the client submits to AMPLIFY. Clients may impose restrictions on investing in specific securities or types of securities.

## Financial Planning Projects

We provide fiduciary fee-only financial planning services on budgeting, debt elimination, insurance needs analysis, retirement planning, risk management, college savings, cash flow, debt management, work benefits, estate planning, charitable giving, and investment planning.

Financial planning includes evaluating a Client's current and future financial state using known variables to predict future cash flows, asset values, and withdrawal plans. The key defining aspect of financial planning is that through the financial planning process, all questions, information, and analysis will be considered as they affect and are affected by the entire financial and life situation of the Client. Clients purchasing this service will receive a written or an electronic report, providing the Client with a detailed financial plan to achieve their stated financial goals and objectives.

In general, the financial plan will address any or all of the following areas of concern. The Client and advisor will work together to select specific areas to cover. These areas may include, but are not limited to, the following:

- **Business Planning:** We provide consulting services for Clients who currently operate their own business, are considering starting a business, or are planning to exit their current business. Under this type of engagement, we work with you to assess your current situation, identify your objectives, and develop a plan to achieve your goals.
- **Cash Flow and Debt Management:** We will review your income and expenses to determine your current surplus or deficit, along with advice on prioritizing how to allocate surplus to attain goals, eliminate debt, and provide advice to reduce expenses best. Concerning debt elimination, advice will consider which debts to pay off first based on factors such as the debt's interest rate and any income tax ramifications. We may also recommend what we believe to be an appropriate cash reserve for emergencies and other financial goals, along with a review of accounts (such as money market funds) for such reserves, plus strategies to save desired amounts.
- **College Savings:** This may include projecting the amount needed to achieve college or other post-secondary education funding goals and advice on saving the desired amount. Recommendations for savings strategies are included and may include consideration of outside sources, such as scholarships and financial aid. Also, we can explore options to assist with education savings for grandchildren or other loved ones with clients.

- **Employee Benefits Optimization:** We will review and analyze whether you, as an employee, are taking the maximum advantage of your employee benefits. If you are a business owner, we will consider and recommend the various benefit programs that can be structured to meet your business and personal retirement goals.
- **Estate Planning:** This usually includes an analysis of your exposure to estate taxes and your current estate plan, i.e., whether you have a will, powers of attorney, trusts, and other related documents. Our advice also typically includes ways to minimize or avoid future estate taxes by implementing appropriate estate planning strategies, such as using applicable trusts. We recommend consulting with a qualified estate planning attorney when initiating, updating, or completing estate planning activities. We may provide you with contact information for attorneys specializing in estate planning when you wish to hire an attorney. From time to time, we will participate in meetings or phone calls between you and your attorney with your approval or request.
- **Financial Goals:** We will help Clients identify financial goals and develop a plan to reach them. We will determine what you plan to accomplish, what resources you will need to make it happen, how much time you require to achieve the goal, and how much you should budget for each goal.
- **Insurance:** Review existing policies to ensure proper coverage for life, health, disability, long-term care, liability, home, and automobile.
- **Investment Analysis:** This may involve developing an asset allocation strategy to meet Clients' financial goals and risk tolerance, providing information on investment vehicles and strategies, reviewing employee stock options, and assisting you in establishing your investment account at a selected broker/dealer or custodian. The approach and types of investments we may recommend are also in Item 8 of this brochure.
- **Retirement Planning:** Our retirement planning services typically include projections of your likelihood of achieving your financial goals, focusing on financial independence as the primary objective. For situations where projections show less than the desired results, we may make recommendations, including those that may impact the original projections, by adjusting certain variables (e.g., working longer, saving more, spending less, taking more risk with investments).

Suppose you are near retirement or already retired. In that case, advice may be given on appropriate distribution strategies to minimize the likelihood of running out of money or adversely altering spending during retirement.

- **Risk Management:** A risk management review includes an analysis of your exposure to major risks that could significantly adversely impact your financial picture, such as premature death, disability, property and casualty losses, or the need for long-term care planning. Risk management advice may include minimizing such risks and weighing the costs of purchasing insurance versus the benefits and, likewise, the potential cost of not purchasing insurance

("self-insuring").

- **Tax Planning Strategies:** Advice may include ways to minimize current and future income taxes as a part of your overall financial planning picture. For example, we may make recommendations concerning charitable giving or on which type of account(s) or specific investments should be owned based in part on their "tax efficiency," with the consideration that there is always a possibility of future changes to federal, state or local tax laws and rates that may impact your situation.

We recommend that you consult with a qualified professional before initiating such things as a tax planning strategy, estate planning, and debt elimination or consolidation. We may provide you with contact information for accountants or attorneys who specialize in these areas if you wish to hire someone for such purposes. With your approval, we will participate in meetings or phone calls between you and your expert professional. While we may recommend professionals, this does not constitute a qualification or approval concerning their ability to meet your needs. We do not receive any fees or commissions for any referrals.

### **Holistic Financial Planning**

This service involves working one-on-one with a planner over an extended period. By paying a fixed monthly/quarterly fee, Clients get to work with a planner who will help them develop and help them implement their plan. The planner will review the plan, recommend any changes, and ensure the plan is up to date and as needed as determined by the planner and client during the planning process. At the client's direction, the planner will assist with executing the plan. The review frequency is determined through the planning process and agreed upon and outlined in the engagement of service.

Upon desiring a comprehensive plan, a Client receives advice and guidance to establish their goals and values around money. They will be required to provide information to help complete the following areas of analysis: net worth, cash flow, insurance, credit scores/reports, employee benefits, retirement planning, insurance, investments, college planning, and estate planning. Once the advisor reviews the Client's information, the advisor creates an individualized plan with the Client's input and feedback appropriately considered, and each plan is individualized for each Client; findings, analysis, and potential changes to their current situation and updates will be analyzed as needed with the Client. Clients subscribing to this service will receive a written or an electronic report, providing the Client with a detailed financial plan to achieve their stated financial goals and objectives. Follow-up meetings to review the plan will be conducted at the Client's convenience. On at least a semi-annual basis, there will be a meeting and complete review of this plan to ensure its accuracy and ongoing appropriateness. Any needed updates will be noted and adjusted at that time.

### **Educational Seminars and Speaking Engagements**

We may provide seminars on an "as announced" basis for groups seeking general advice on investments and other areas of personal finance. The content of these seminars will vary depending on the needs of the attendees. These seminars are purely educational and do not involve the sale of any investment products. Information presented will not be based on any person's need, nor does AMPLIFY provide individualized investment advice to attendees during these seminars.

### **Complimentary Consultations May Be Offered**

We may provide complimentary consultations so potential clients can share their goals and needs, ask questions, and ultimately better understand what services AMPLIFY offers. This will allow the potential client to decide whether AMPLIFY is a good fit for them; only information, no advice, will be shared.

### **Wrap-Fee Programs**

We do not participate in wrap-fee programs.

## **Item 5: Fees and Compensation**

Please note, unless a Client has received the firm's Disclosure Brochure at least 48 hours before signing the investment advisory contract, the Client may terminate the investment advisory contract within five (5) business days of signing the contract without incurring any advisory fees. The method of payment depends on the type of advisory service we are performing. Please review the fee and compensation information below.

Half of all agreed-upon fees must be paid upfront, with the remaining due upon completion of the service. If the amount paid upfront exceeds the amount owed for services performed, AMPLIFY will refund the difference to the client for hourly and project-based services. Clients may be charged up to half of an agreed-upon hourly fee when a client cancels within twenty-four hours of an appointment. Suppose a client cancels a meeting for a project-based fee for service, and the service has already been commenced or completed. In that case, the client may not cancel the service and must pay the total amount agreed upon for the services requested and rendered as of the point of cancellation. Clients can incur a thirty-dollar charge for canceled checks, transfers, or reversed charges in addition to the amount owed to AMPLIFY.

### **Holistic Financial Planning**

Ongoing Financial Planning consists of an upfront charge of \$250 - \$2,500 and an ongoing fee that is paid either monthly or quarterly, in advance, at \$100 - \$500 per month (\$300 - \$1,500 per quarter). The fee may be negotiable in some instances. Fees for this service may be paid by electronic funds transfer or check. This service can terminate with 30 days' notice. Upon termination of any agreement, the fee is prorated, and any unearned fees are refunded to the Client.

The upfront portion of the Comprehensive Financial Planning fee is for Client onboarding, data gathering, and setting the basis for the financial plan. This work commences immediately after the payment is made, and the client shares any necessary data with AMPLIFY and then completes it within the first 30 days unless other arrangements are made with the client. Therefore, the upfront portion of the fee is paid at most six months in advance.

### **Financial Planning Fixed Fee**

Financial Planning can be for a fixed fee on a project basis, depending upon the project's complexity. The fixed fee will be agreed upon before the start of any work. The fixed fee can range between \$200 and \$7,200. The fee is negotiable. If a fixed fee program is chosen, the fee is due at the beginning before the commencement of the process. However, AMPLIFY will not bill over \$500.00 more than six months in advance. Fees for this service may be paid by electronic funds transfer or check. In the event of early termination, any prepaid but unearned fees will be refunded to the Client; any completed project deliverables will be provided to the Client, and no further fees will be charged.



## **Financial Planning Hourly Fee**

A Financial Planning fee of up to \$250 per hour may be available. The fee is due upon booking each meeting, with any outstanding balance due upon completion of each engagement. Fees incurred beyond an hour within the same session will be billed in 15-minute increments and due upon the completion of the session.

Fees for this service may be paid by electronic funds transfer or check. In the event of early termination, any prepaid but unearned fees will be refunded to the Client; any completed project deliverables will be provided to the Client, and no further fees will be charged.

## **Educational Seminars/ Speaking engagements**

Seminars on various financial topics are offered to organizations and the public. Fees range from free to \$18,000 per seminar or free to \$720 per participant. Multiple days or seminars per day are separate seminars/engagements. Half of the fees are due before the engagement, and the other half is to be paid half a week before the actual engagement and the last forty-four hours before the day of the engagement/seminar. When the seminar is virtual or available virtually, the fee is paid in full at registration time. The fee range is based on the content, the amount of research conducted, the number of hours of preparation needed, and the number of attendees. In inclement weather or flight cancellations, the Speaker shall make all reasonable attempts to make alternative travel arrangements to arrive in time for the presentation. The Speaker's fee is waived if travel proves impossible; However, the Client will still be responsible for reimbursing non-refundable travel expenses.

Suppose the Client decides to cancel or change the event date for any reason, the Client will still be responsible for reimbursement of any non-refundable travel expenses already incurred and will provide payment for 100% of the Speaker's fee if the cancellation occurs within 30 days of the event. Suppose the Speaker must cancel due to health or similar unforeseen circumstances. In that case, the Speaker will make all attempts to find a reasonable alternative engagement date and absorb any incremental additional costs for obtaining alternative travel arrangements. If there is no alternate date, the Client will not be responsible for any travel costs already incurred by the Speaker or any portion of the Speaker's fee.

Educational Seminars and Speaking Engagements may be provided pro-bono at AMPLIFY MY WEALTH LLC's discretion.

## **Other Types of Fees and Expenses**

When implementing an investment recommendation, the Client may incur additional fees such as brokerage commissions, transaction fees, and other related costs and expenses. Clients may incur charges imposed by broker-dealers and other third parties, such as custodial fees, deferred sales charges, odd-lot differentials, transfer taxes, wire transfers, electronic fund fees, and other fees and taxes on brokerage accounts and securities transactions. Mutual Funds and exchange-traded funds also charge internal management fees, outlined in a fund's prospectus. Such charges, fees, and

commissions are exclusive of and in addition to our fee, and we shall not receive any portion of these commissions, fees, and costs.

Item 12 further describes the factors we consider in selecting or recommending broker-dealers for the Client's transactions and determining the reasonableness of their compensation (e.g., commissions).

We do not accept compensation for the sale of securities or other investment products, including asset-based sales charges or service fees from the sale of mutual funds.

## Item 6: Performance-Based Fees and Side-By-Side Management

We do not offer performance-based fees and do not engage in side-by-side management.

## Item 7: Types of Clients

We provide financial planning and investment advising services to goal-driven individuals, from children to retired individuals, high net-worth individuals, entrepreneurs, and small businesses. We do not have a minimum account size requirement.

## Item 8: Methods of Analysis, Investment Strategies, and Risk of Loss

When Clients have us complete an Investment Analysis (described in Item 4 of this brochure) as part of their financial plan, our primary methods of investment analysis are fundamental, technical, cyclical, and charting analysis.

### Passive Investment Management

We primarily practice passive investment management. Passive investing involves building portfolios comprised of various distinct asset classes. The asset classes are weighted to achieve the relationship between correlation, risk, and return. Funds that passively capture the returns of the desired asset classes included in the portfolio. The funds used to build passive portfolios usually include index mutual funds or exchange-traded funds.

Passive investment management also emphasizes low portfolio expenses (i.e., the funds inside the portfolio have low internal costs), minimal trading costs (due to infrequent trading activity), and relative tax efficiency (because the funds inside the portfolio are tax efficient and turnover inside the portfolio is minimal).

In contrast, active management involves a single manager or managers who employ some method, strategy, or technique to construct a portfolio to generate returns greater than the broader market or a designated benchmark. Academic research indicates most active managers underperform the market.

### Material Risks Involved

AMPLIFY does not provide investment management. However, investment recommendations may be part of the financial planning service. **All our investment strategies involve risk and may result in**

**losing your original investment, which you should be prepared to bear.** These risks apply equally to stocks, bonds, commodities, and other investments or securities. Material risks associated with our investment strategies are listed below.

**Market Risk:** Market risk involves the possibility that an investment's current market value will fall because of a general market decline, reducing the value of the investment regardless of the operational success of the issuer's operations or financial condition.

**Strategy Risk:** The Adviser's investment strategies and techniques may not work as intended.

**Small and Medium Cap Company Risk:** Securities of companies with small and medium market capitalizations are often more volatile and less liquid than investments in larger companies. Small and medium-cap companies may face a greater risk of business failure, which could increase the volatility of the Client's portfolio.

**Turnover Risk:** Some investment strategies may have a higher portfolio turnover rate than others. A high portfolio turnover would result in correspondingly greater brokerage commission expenses and may result in the distribution of additional capital gains for tax purposes. These factors may negatively affect the account's performance.

**Limited markets:** Certain securities may be less liquid (more challenging to sell or buy), and their prices may sometimes be more volatile than at other times. Under certain market conditions, we may be unable to sell or liquidate investments at reasonable or favorable prices or find buyers at any price.

**Concentration Risk:** Certain investment strategies focus on particular asset classes, industries, sectors, or types of investment. From time to time, these strategies may be subject to more significant risks of adverse developments in such areas of focus than a more broadly diversified strategy across a wider variety of investments.

**Interest Rate Risk:** Bond (fixed income) prices generally fall when interest rates rise, and the value may fall below par value or the principal investment. The opposite is also generally true: bond prices usually rise when interest rates fall. Fixed-income securities with longer maturities may be more sensitive to these price changes. Most other investments are also sensitive to the level and direction of interest rates.

**Legal or Legislative Risk:** Legislative changes or Court rulings may impact the value of investments or the securities' claim on the issuer's assets and finances.

**Inflation:** Even if your investments' dollar value remains unchanged, inflation may erode your portfolio's buying power.

### **Risks Associated with Securities**

Apart from the general risks outlined above, which apply to all investments, specific securities may have other risks.

**Commercial Paper** is, in most cases, an unsecured promissory note issued with a maturity of 270 days or less. Being unsecured, the risk to the investor is that the issuer may default.

**Common stocks** may go up and down in price quite dramatically and, in the event of an issuer's bankruptcy or restructuring, could lose all value. A slower-growth or recessionary economic environment could have an adverse effect on the price of all stocks.

**Corporate Bonds** are debt securities to borrow money. Generally, issuers pay investors periodic interest and repay the amount borrowed either periodically during the life of the security and/or at maturity. Alternatively, investors can purchase other debt securities, such as zero coupon bonds, which do not pay current interest but are priced at a discount from their face values, and their values

accrue over time to face value at maturity. The market prices of debt securities fluctuate depending on factors such as interest rates, credit quality, and maturity. In general, market prices of debt securities decline when interest rates rise and increase when interest rates fall. The longer the time to a bond's maturity, the greater its interest rate risk.

**Bank Obligations**, including bonds and certificates of deposit, may be vulnerable to setbacks or panics in the banking industry. Banks and other financial institutions are greatly affected by interest rates and may be adversely impacted by downturns in the U.S. and foreign economies or changes in banking regulations.

**Municipal Bonds** are debt obligations generally issued to obtain funds for various public purposes, including constructing public facilities. Municipal bonds pay a lower rate of return than most other types of bonds. However, because of a municipal bond's tax-favored status, investors should compare the relative after-tax return to the after-tax return of other bonds, depending on the investor's tax bracket. Investing in municipal bonds carries the same general risks as investing in bonds. Those risks include interest rate, reinvestment, inflation, market, call or redemption, credit, liquidity, and valuation risks.

**Options and other derivatives** carry many unique risks, including time sensitivity, and can result in the complete loss of principal. While covered call writing does provide a partial hedge to the stock against which the call is written, the hedge is limited to the amount of cash flow received when writing the option. When selling covered calls, there is a risk the underlying position may be called away at a price lower than the current market price.

**Exchange Traded Funds** prices may vary significantly from the Net Asset Value due to market conditions. Certain Exchange-traded Funds may not track underlying benchmarks as expected. ETFs are also subject to the following risks: (i) an ETF's shares may trade at a market price that is above or below their net asset value; (ii) the ETF may employ an investment strategy that utilizes high leverage ratios; or (iii) trading of an ETF's shares may be halted if the listing exchange's officials deem such action appropriate, the shares are de-listed from the exchange, or the activation of market-wide "circuit breakers" (which are tied to significant decreases in stock prices) halts stock trading generally. The Adviser has no control over the risks taken by the underlying funds in which the Clients invest.

**Investment Companies Risk.** When a Client invests in open-end mutual funds or ETFs, the Client indirectly bears its proportionate share of any fees and expenses payable directly by those funds. Therefore, the Client will incur higher expenses, which may be duplicative. In addition, the Client's overall portfolio may be affected by losses of an underlying fund and the level of risk arising from the investment practices of an underlying fund (such as the use of derivatives).

## Item 9: Disciplinary Information

### **Criminal or Civil Actions**

AMPLIFY and its management have not been involved in any criminal or civil action.

### **Administrative Enforcement Proceedings**

AMPLIFY and its management have not been involved in administrative enforcement proceedings.

### **Self-Regulatory Organization Enforcement Proceedings**

AMPLIFY and its management have not been involved in legal or disciplinary events that are material to a Client's or prospective Client's evaluation of AMPLIFY or the integrity of its management.

## Item 10: Other Financial Industry Activities and Affiliations

No AMPLIFY employee is registered or has an application pending to register as a broker-dealer or a registered broker-dealer representative.

No AMPLIFY employee is registered or has an application pending to register as a futures commission merchant, commodity pool operator, or commodity trading advisor.

AMPLIFY does not have any related parties. As a result, we do not have a relationship with any related parties.

AMPLIFY only receives compensation directly from Clients. We do not receive compensation from any outside source. We do not have any conflicts of interest with any outside party.

Alissa Maizes is a licensed attorney and is not currently practicing law.

## Item 11: Code of Ethics or Interest in Client Transactions and Personal Trading

As a fiduciary, our firm and its associates have a duty of utmost good faith to act solely in the best interests of each Client. Our Clients entrust us with their financial and personal information, which places a high standard on our conduct and integrity. Our fiduciary duty is a core aspect of our Code of Ethics and represents the expected basis of our dealings. The firm also accepts the obligation to comply with the mandates and requirements of all applicable laws and regulations and act ethically and professionally in all professional services and activities.

### Code of Ethics Description

This code does not attempt to identify all possible conflicts of interest, and literal compliance with each of its specific provisions will not shield associated persons from liability for personal trading or other conduct that violates a fiduciary duty to advisory Clients. A summary of the Code of Ethics Principles is outlined below.

- Integrity - Associated persons shall offer and provide professional services with integrity.
- Objectivity - Associated persons shall be objective in providing professional services to Clients.
- Competence—Associated persons shall provide services to Clients competently and maintain the necessary knowledge and skill to continue to do so in the areas in which they are engaged.
- Fairness - Associated persons shall perform professional services in a manner that is fair and reasonable to Clients, principals, partners, and employers and shall disclose conflict(s) of interest in providing such services.
- Confidentiality - Associated persons shall not disclose confidential Client information without the Client's specific consent unless in response to proper legal process or as required by law.

- Professionalism - Associated persons' conduct in all matters shall reflect the credit of the profession.
- Diligence - Associated persons shall act diligently in providing professional services.

We periodically review and amend our Code of Ethics to remain current. We require all firm access persons to attest to their understanding of and adherence to the Code of Ethics at least annually. Our firm will provide a copy of its Code of Ethics to any Client or prospective Client upon request.

### **Investment Recommendations Involving a Material Financial Interest and Conflicts of Interest**

Neither our firm, its associates, nor any related person is authorized to recommend to a Client or effect a transaction for a Client involving any security in which our firm or a related person has a material financial interest, such as in the capacity of an underwriter, adviser to the issuer, etc.

### **Advisory Firm Purchase of Same Securities Recommended to Clients and Conflicts of Interest**

Our firm and its "related persons" may buy or sell securities similar to, or different from, those we recommend to Clients for their accounts. To reduce or eliminate certain conflicts of interest involving the firm or personal trading, our policy may require that we restrict or prohibit associates' transactions in specific reportable securities transactions. The firm principal must approve any exceptions or trading pre-clearance before the transaction in an account. We maintain the required personal securities transaction records per regulation.

### **Trading Securities At/Around the Same Time as Client's Securities**

From time to time, our firm or its "related persons" may buy or sell securities for themselves at or around the same time as Clients. We will not trade non-mutual fund securities 5 days before the same security for Clients.

## **Item 12: Brokerage Practices**

### **Factors Used to Select Custodians and/or Broker-Dealers**

AMPLIFY MY WEALTH LLC does not have any affiliation or relationships with Broker-Dealers. AMPLIFY has no client assets under management, does not execute client trades, or has custodian account arrangements. When recommending a Broker/Dealer, AMPLIFY focuses on low-cost options and considers, among other things, where a client may already have an account and the client's preference, such as brick-and-mortar options or specific investment options that they may prefer.

#### **1. Research and Other Soft-Dollar Benefits**

We currently do not receive soft dollar benefits.

#### **2. Brokerage for Client Referrals**

We accept no referrals from a broker-dealer or third party in exchange for using that broker-dealer or third party.

#### **3. Clients Directing Which Broker/Dealer/Custodian to Use**

As a fee-only financial planner who offers investment advice but does not offer ongoing Investment Advisory Management Services or Assets Under Management, we are not financially impacted by which broker-dealers a client may choose to implement our investment recommendations.

## Item 13: Review of Accounts

ALISSA KRASNER MAIZES, PRINCIPAL, AND CCO of AMPLIFY will work with Clients to obtain current information regarding their assets and investment holdings. They will review this information as part of our financial planning services. AMPLIFY does not provide specific reports to Clients other than financial plans. Once the Client's information is reviewed, their plan will be built and analyzed, and then the findings, analysis, and potential changes to their current situation will be reviewed with the Client. Clients subscribing to this service will receive a written or an electronic report, providing the Client with a detailed financial plan designed to achieve their stated financial goals and objectives. Follow-up meetings to review the plan will be conducted at the Client's convenience. At least semi-annually, there will be a meeting and complete review of this plan to ensure its accuracy and ongoing appropriateness. Any needed updates to the plan should be made and then implemented by the client.

## Item 14: Client Referrals and Other Compensation

We do not receive any economic benefit, directly or indirectly, from any third party for advice rendered to our Clients. Nor do we, directly or indirectly, compensate any person who is not advisory personnel for Client referrals.

## Item 15: Custody

AMPLIFY does not accept custody of Client funds.

AMPLIFY does not accept custody of Client funds except in the instance of withdrawing Client fees.

## Item 16: Investment Discretion

We do not provide Investment Advisory Services and, therefore, do not exercise discretion.

## Item 17: Voting Client Securities

AMPLIFY does not have custody or discretion nor vote Client securities. We do not vote for Client proxies. Therefore, Clients maintain exclusive responsibility for (1) voting proxies and (2) acting on corporate actions on the Client's investment assets. The Client shall instruct the Client's qualified custodian to forward copies of all proxies and shareholder communications relating to the Client's investment assets to the Client. You should receive proxy materials directly from the account custodian.

# Item 18: Financial Information

Registered Investment Advisers are required in this Item to provide you with specific financial information or disclosures about our financial condition. We have no financial commitment that impairs our ability to meet contractual and fiduciary obligations to Clients, and we have not been the subject of a bankruptcy proceeding.

We do not have custody of Client funds or securities or require or solicit prepayment of more than \$500 in fees per Client six months in advance.

# Item 19: Requirements for State-Registered Advisers

## **ALISSA KRASNER MAIZES**

Born: 1968

### **Educational Background**

- 1993 - JURIS DOCTOR, BROOKLYN LAW SCHOOL
- 1990 - BACHELOR OF SCIENCE, NORTHEASTERN UNIVERSITY

### **Business Experience**

- 04/2021 - Present, AMPLIFY MY WEALTH LLC, PRINCIPAL, and CCO
- 09/2001 - Present, ProBono for Nonprofits, IMPACT AND FUNDRAISING STRATEGIST
- 07/2019 -05/2021, ATWOOD FINANCIAL PLANNING, INTERN

### **Professional Designations, Licensing & Exams**

**ATTORNEY, LICENSED IN THE STATE OF NEW YORK.** Qualifications met to become a licensed attorney in New York: Earned undergraduate and law school degree, passed the New York State Bar and ethics exam, and admitted to practice law in the State of New York in October 1994. Although admitted and licensed to practice law in New York, Alissa Krasner Maizes does not actively practice law.

**LICENSED INVESTMENT ADVISOR REPRESENTATIVE.** Qualifications met to become licensed as an investment advisor representative were taking and passing the Series 65 Exam.

### **Other Business Activities**

ALISSA KRASNER MAIZES works pro bono for nonprofits as an IMPACT AND FUNDRAISING STRATEGIST. This activity accounts for approximately 10% of their time.

### **Performance-Based Fees**



AMPLIFY MY WEALTH LLC is not compensated by performance-based fees.

Please refer to Item 6 of this brochure.

### **Material Disciplinary Disclosures**

No management person at AMPLIFY MY WEALTH LLC has ever been involved in an arbitration claim or been found liable in a civil, self-regulatory organization or administrative proceeding.

### **Material Relationships That Management Persons Have With Issuers of Securities**

AMPLIFY MY WEALTH LLC and ALISSA KRASNER MAIZES do not have any relationships or arrangements with issuers of securities as noted and beyond what is described in Item 10.

### **Additional Compensation**

ALISSA KRASNER MAIZES does not receive any economic benefit from any person, company, or organization in exchange for providing Clients advisory services through AMPLIFY.

### **Supervision**

ALISSA KRASNER MAIZES, as PRINCIPAL and Chief Compliance Officer of AMPLIFY, is responsible for the supervision and may be contacted at the phone number on this brochure supplement.

### **Requirements for State Registered Advisers**

ALISSA KRASNER MAIZES has NOT been involved in an arbitration, civil proceeding, self-regulatory proceeding, administrative proceeding, or bankruptcy petition.



AMPLIFY MY WEALTH

AMPLIFY MY WEALTH LLC

Boca Raton, FL 33434  
561-866-2235

April 1, 2024

Form ADV Part 2B - Brochure Supplement

**ALISSA KRASNER MAIZES - Individual CRD# 7334230**

PRINCIPAL and Chief Compliance Officer

This brochure provides information about ALISSA KRASNER MAIZES that supplement the AMPLIFY MY WEALTH LLC ("AMPLIFY") brochure. A copy of that brochure precedes this supplement. Please contact ALISSA KRASNER MAIZES if AMPLIFY's brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about ALISSA KRASNER MAIZES is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov), which can be found using the identification number 7334230.

# Item 2: Educational Background and Business Experience

## ALISSA KRASNER MAIZES

Born: 1968

### Educational Background

- 1993 JURIS DOCTOR, BROOKLYN LAW SCHOOL
- 1990 BACHELOR OF SCIENCE, CUM LAUDE NORTHEASTERN UNIVERSITY

### Business Experience

- 04/2021 - Present, AMPLIFY MY WEALTH LLC, PRINCIPAL and CCO
- 08/2023 - Present, SAVVY LADIES, PRO BONO FINANCIAL ADVISOR.
- 09/2001 - Present, ProBono for Nonprofits, IMPACT AND FUNDRAISING STRATEGIST
- 07/2019 -05/2021, ATWOOD FINANCIAL PLANNING, INTERN

### Professional Designations, Licensing & Exams

**ATTORNEY, LICENSED IN THE STATE OF NEW YORK.** Qualifications met to become a licensed attorney in New York: Earned undergraduate and law school degree, passed the New York State Bar and ethics exam, and admitted to practice law in the State of New York in October 1994. Although admitted and licensed to practice law in New York, Alissa Krasner Maizes does not actively practice law.

**LICENSED INVESTMENT ADVISOR REPRESENTATIVE.** Qualifications met to become licensed as an investment advisor representative were taking and passing the Series 65 Exam.

**CANDIDATE FOR CFP® CERTIFICATION.** Qualifications met by completing the educational requirements to earn a CFP designation within the past five years; the candidate has also completed the experience requirements.

# Item 3: Disciplinary Information

No management person at AMPLIFY MY WEALTH LLC has ever been involved in an arbitration claim or been found liable in a civil, self-regulatory organization or administrative proceeding.

# Item 4: Other Business Activities

ALISSA KRASNER MAIZES provides pro bono work for nonprofits as an IMPACT AND FUNDRAISING STRATEGIST. This activity accounts for approximately 10% of her time.

## Item 5: Additional Compensation

ALISSA KRASNER MAIZES does not receive any economic benefit from any person, company, or organization in exchange for providing Clients' advisory services through AMPLIFY.

## Item 6: Supervision

ALISSA KRASNER MAIZES, Principal and Chief Compliance Officer of AMPLIFY, is responsible for the supervision and may be contacted at the phone number on this brochure supplement. Item 7: Requirements for State Registered Advisers

ALISSA KRASNER MAIZES has NOT been involved in an arbitration, civil proceeding, self-regulatory proceeding, administrative proceeding, or bankruptcy petition.