



## **WISDOM INDEX ADVISORS (Part 2B of Form ADV)**

Form ADV Part 2B is a brochure supplement for Michael J. Davidson. This document supplements the Wisdom Index Advisors Form ADV Part 2A brochure. You should have received a copy of ADV Part 2A. Please contact us at (972) 931-0063 or [mail@wisdomindex.com](mailto:mail@wisdomindex.com) if you did not receive WI's Part 2A brochure or if you have any questions about the contents of this supplement.

Additional information about Michael J. Davidson is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Additional information about Wisdom Index Advisors is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Registration does not imply a certain level of skill or training.

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# Contents

- Item 1: Cover Page..... 1
- Item 1.1: Table of Contents..... 2
- Item 2: Educational Background, Business Experience, and Professional Designations ..... 3
  - A. Educational Background and Business Experience ..... 3
  - B. Professional Designations ..... 3
- Item 3: Disciplinary Information ..... 4
- Item 4: Other Business Activities..... 4
- Item 5: Additional Compensation..... 4
- Item 6: Supervision..... 4
- Item 7: Requirement for State-Registered Advisers ..... 5

## A. Educational Background and Business Experience

Michael J. Davidson, born in May of 1974, graduated from Texas Tech in Engineering with a Master of Engineering in 1997 and a Bachelor's in 1996. Michael J. Davidson's employment information is listed below:

- ▮ **Arthur Andersen** 1997 – 2002 – Business Consultant
- ▮ **Centaurus Financial & Jefferson Pilot Securities** 2002-2004 - Registered Representative
- ▮ **Wisdom Index Advisors** September 4, 2004 to Present. - Co-Founder, Principal.

## B. Professional Designations

### Certified Financial Planner™, CFP®

The CERTIFIED FINANCIAL PLANNER™, CFP®, and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by the Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is voluntary; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and several other countries for its (1) high standard of professional education, (2) stringent code of conduct and standards of practice, and (3) ethical requirements that govern professional engagements with clients. More than 71,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- ▮ **Education**—Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board studies have determined necessary for the competent and professional delivery of financial planning services and attain a bachelor's degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning.
- ▮ **Examination**—Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real-world circumstances.
- ▮ **Experience**—Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- ▮ **Ethics**—Agree to be bound by the CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to maintain the right to continue to use the CFP® marks:

- ▮ **Continuing Education** – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field and
- ▮ **Ethics** – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to the CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### Accredited Investment Fiduciary®, AIF®

- ||| **Designation** - Accredited Investment Fiduciary.
- ||| **Designation Status** - Currently offered and recognized by the issuing organization and Accredited by the American National Standards Institute.
- ||| **Acronym** - AIF®
- ||| **Issuing Organization** - Center for Fiduciary Studies.
- ||| **Prerequisites/Experience Required** - Candidate must meet a point-based threshold based on a combination of education, relevant industry experience and /or professional development.
- ||| **Educational Requirements** - Candidate must complete one of the following: Web-based program and Final Exam.
- ||| **Examination Type** - Final certification exam, proctored closed book.
- ||| **Continuing Education** - 6 hours per year.

### Certified Kingdom Advisor, CKA®

- ||| **Designation** - Certified Kingdom Advisor
- ||| **Designation Status** - Currently offered by the Kingdom Advisors Association
- ||| **Acronym** - CKA®
- ||| **Issuing Organization** - Kingdom Advisors
- ||| **Prerequisites/Experience Required** - Candidate must meet a point-based threshold based on a combination of education, relevant industry experience and /or professional development.
- ||| **Educational Requirements - Candidate** must complete on of the following: Web-based program and Web-based examination.
- ||| **Examination Type** - Final certification exam, web-based
- ||| **Continuing Education** - 10 hours per year

### Item 3: Disciplinary Information

Michael J. Davidson has not been and/or is presently not involved in any disciplinary, legal, or regulatory events that would be material to a client's evaluation of him or of Wisdom Index Advisors.

### Item 4: Other Business Activities

Michael J. Davidson is 100% owner of Wisdom Index LLC. Wisdom Index LLC owns the Wisdom Index Advisors Prosper office. Wisdom Index LLC may purchase additional real estate.

### Item 5: Additional Compensation

Michael J. Davidson does not receive any additional compensation from other sources.

### Item 6: Supervision

Michael J Davidson, Principal and Chief Compliance Officer of WI, supervises Wisdom Index Advisors' investment advisory activities. Wisdom Index Advisors can be contacted by telephone at (972) 931-0063 or by email at [compliance@wisdomindex.com](mailto:compliance@wisdomindex.com).

## Item 7: Requirement for State-Registered Advisers

- Michael J. Davidson has not been involved in an award or found liable in any arbitration claim, civil, self-regulatory organization, or administrative proceedings.
- Michael J. Davidson has not been the subject of a bankruptcy petition.