

Harvest Wealth Planners

Form ADV Part 2B – Brochure Supplement

for

**Dennis Sakurai
446 Carlston Street
Richmond, CA 94805
(510) 219-4693
dsakurai@live.com**

Effective: December 3, 2024

This Form ADV2B (“Brochure Supplement”) provides information about the background and qualifications of Dennis Sakurai (CRD# **6848460**) in addition to the information contained in the Harvest Wealth Planner, LLC (the “Advisor”) (CRD # **325204**) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the Harvest Wealth Planner Disclosure Brochure or this Brochure Supplement, please contact us at (510) 219-4693.

Additional information about Mr. Sakurai is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Mr. Dennis Sakurai is CEO for Harvest Wealth Planners, LLC. He is in the process of seeking RIA registration of Harvest Wealth Planners as a Registered Investment Advisor. Mr. Sakurai will act as CEO, CCO and Investment Advisor of Harvest Wealth Planners. Mr. Sakurai, born in May of 1963, graduated in 1997 California State University East Bay with BS degrees in Accounting and Finance, and in 1997 he graduated from Golden Gate University with an MBA in Corporate Finance. He is dedicated to advising Clients.

Licensing and Examinations

Series 66, 04/2005

Employment History:

Owner, Financial Advisor, Harvest Wealth Planners	02/2023 to Present
Independent Insurance Agent, Various	11/2024 to Present
Owner, Sakurai Financial Group	06/2014 to 11/2024
Financial Advisor, McNally Financial Services	08/2017 to 05/2023
Owner, Advisor, Dennis Sakurai Accounting	06/1995 to 11/2024
Owner, Advisor, Dennis Financial Group	06/2014 to 11/2024
Controller, Lewis and Taylor	00/2011 to 05/2016

Item 3 – Disciplinary Information

Mr. Sakurai does not have any legal or disciplinary events that are material to a client's or prospective client's evaluation of its advisory business or the integrity of its management. Mr. Sakurai's FINRA Brokercheck may have additional information regarding the disciplinary history of Dennis Sakurai that is not included in this brochure supplement (<http://brokercheck.finra.org>).

Item 4 – Other Business Activities

Mr. Dennis Sakurai is an Independent Insurance Agent for multiple firms. In this role Mr. Sakurai provides insurance services (including transacting in annuities) with various clients and insurance firms. He spends approximately 40 hours a month in this business during market and non-market hours in this endeavor.

Item 5 – Additional Compensation

Mr. Sakurai is compensated for his additional business activities that are detailed in Item 4 above.

Item 6 – Supervision

As a supervised person, Mr. Sakurai's activities are supervised and monitored by himself as Chief Compliance Officer (CCO). He can be reached at (510) 219-4693

Harvest Wealth Planners, LLC, has implemented a Code of Ethics and internal compliance that guide each employee in meeting their fiduciary obligations to Clients of Harvest Wealth Planners. Further, Harvest Wealth Planners is subject to regulatory oversight by various agencies. These agencies require registration by Harvest Wealth Planners and its employees. Harvest Wealth Planners is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

Item 7 – Requirements for State Registered Advisors

- A. Dennis Sakurai has **NOT** been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
 2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
- B. Dennis Sakurai has **NOT** been the subject of a bankruptcy petition at any time.