

State of South Carolina Firm Brochure



**Wilson David Corporation
Db a Wilson David Investment Advisors**

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Form ADV Part 2 Brochure – South Carolina

This brochure provides information about the qualifications and business practices of Wilson David Corporation. Being registered as a registered investment adviser does not imply a certain level of skill or training. For questions about the contents of this brochure, please contact us at 803-507-6300 or by email at kathy@wilsondavid.com or hauer.kathy@gmail.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Wilson David Corporation (CRD # 172841) is available on the SEC's website at www.adviserinfo.sec.gov.

Form ADV – Part 2A – Firm Brochure

Item 1: Cover Page	1
Item 2: Material Changes (None)	1
Item 3: Table of Contents	2
Item 4: Advisory Business	4
Firm Description	4
Principal Owners	4
Types of Advisory Services	4
Client-Tailored Services and Client-Imposed Restrictions	4
Wrap Fee Programs	5
Client Assets under Management	5
Item 5: Fees and Compensation	5
Method of Compensation and Fee Schedule	5
Additional Client Fees Charged	6
Prepayment of Client Fees	6
External Compensation for the Sale of Securities to Clients	6
Item 6: Performance-Based Fees	6
Sharing of Capital Gains	6
Item 7: Types of Clients	6
Description	6
Account Minimums.....	6
Item 8: Methods of Analysis, Investment Strategies and Risk of Loss	7
Methods of Analysis.....	7
Investment Strategy.....	7
Security Specific Material Risks.....	7
Item 9: Disciplinary Information	8
Criminal or Civil Actions.....	8
Administrative Enforcement Proceedings.....	8
Self-Regulatory Organization Enforcement Proceedings.....	8
Item 10: Other Financial Industry Activities and Affiliations	8
Broker-Dealer or Representative Registration.....	8
Futures or Commodity Registration.....	8
Material Relationships Maintained by this Advisory Business and Conflicts of Interest.....	8
Recommendations or Selections of Other Investment Advisors and Conflicts of Interest.....	8
Item 11: Code of Ethics, Participation in Client Transactions and Personal Trading	9
Code of Ethics Description	9
Investment Recommendations Involving Material Financial Interest and Conflict of Interest ...	9
Personal Trading	9
Item 12: Brokerage Practices	10
Factors Used to Select Broker-Dealers for Client Transactions	10
Aggregating Securities Transactions for Client Accounts	10
Item 13: Review of Accounts	10
Schedule for Review of Client Accounts and Advisory Persons Involved	10
Review of Client Accounts on Non-Periodic Basis	10
Content of Client-Provided Reports and Frequency	10

Item 14: Client Referrals and Other Compensation	11
Economic Benefits Provided to Firm from External Sources and Conflicts of Interest	11
Advisory Firm Payments for Client Referrals	11
Item 15: Custody	11
Account Statements	11
Item 16: Investment Discretion	11
Discretionary Authority for Trading	12
Item 17: Voting Client Securities	12
Proxy Votes	12
Item 18: Financial Information	12
Balance Sheet	12
Financial Conditions Likely to Impair Firm’s Ability to Meet Commitments to Clients	12
Bankruptcy Petitions during the Past Ten Years	12
Item 19: Requirements for State Registered Advisors	12
Principal Executive Officers and Management Persons	12
Educational Background and Business Experience	12
Outside Business Activities	12
Performance Based Fee Description	12
Disclosure of Material Facts Related to Disciplinary Actions Involving Management.....	12
Material Relationship Maintained by this Firm or Management with Issuers of Securities.....	12
Supervised Person Brochure	13
Brochure Supplement (Part 2B of Form ADV).....	13
Principal Executive Officer.....	13
Kathryn B. Hauer.....	13
Martin D. Lunn.....	13
Educational Background and Business Experience.....	14
Disciplinary Information.....	14
Other Business Activities.....	14
Performance Based Fee Description.....	14
Supervision.....	14
Requirements for State-Registered Advisors.....	14

Item 4 Advisory Business

Firm Description

Wilson David Corporation (Wilson David) was founded in 2014. Kathryn B. Hauer and Martin D. Lunn are 100% stockholders. Wilson David is an investment advisory firm. The firm does not sell annuities, insurance, stocks, bonds, mutual funds, limited partnerships, or other commissioned products.

Wilson David provides personalized confidential investment advice to individuals. Advice is provided through consultation with the client and may include determination of financial objectives, identification of financial problems, cash flow management, tax planning, insurance review, investment management, education funding, retirement planning, and estate planning.

Wilson David does not act as a custodian of client assets. Wilson David uses the services of Folio Institutional (Folio) to custody client assets. The client's asset custody at Folio is managed on a discretionary basis. Client assets are not commingled. Each client is the registered owner, trustee, or executor of his or her own account. All Wilson David clients are asked to sign a limited power of attorney (LPOA) authorizing Folio, at the direction of the investment adviser, to execute trades to buy and sell securities for the client, deduct management fees, and to disburse funds on behalf of the client. Investment Advisor Representatives (IARs) Kathryn Hauer and Martin Lunn monitor the daily activities of securities selected for a portfolio.

An evaluation of each client's goals and objectives is provided to the client. Periodic reviews (undertaken no less than quarterly) are communicated to clients. More frequent reviews occur but are not necessarily communicated to the client unless immediate changes are recommended. Other professionals (e.g., lawyers, accountants, insurance agents, etc.) are engaged directly by the client on an as-needed basis.

Principal Owners

Kathryn B. Hauer and Martin D. Lunn are 100% stockholders.

Types of Advisory Services

Wilson David furnishes investment advice through consultations. Wilson David is a small independent firm specializing in investment advice and portfolio management. We also provide fee-based and hourly general financial planning services, college and college loan financial planning, and trading coaching. NOTE: The client is under no obligation to act upon the investment advisor's recommendations. If the client elects to act upon any of the recommendations, the client is under no obligation to effect the transaction through the investment advisor.

Client-Tailored Services and Client-Imposed Restrictions

Goals and objectives for each client are documented in our client files. Investment strategies are created that reflect the stated goals and objectives. Clients may impose restrictions on investing in certain securities or types of securities. Agreements may not be assigned without written client consent.

Wrap Fee Programs

Wilson David does not participate in wrap fee programs.

Item 5: Fees and Compensation

Method of Compensation and Fee Schedule for Investment Advisory Services

Wilson David bases its fees on a percentage of assets under management. Our firm offers investment advisory services for 0.9% to 1.25 % of assets under management (AUM) per year depending on the amount of AUM held at Wilson David. The annual fee may be tax deductible if management fees are paid from a non-retirement account and total management fees for the year exceed two percent of the adjusted gross income.

Fees are based on the market value of supervised assets at the commencement of service with Wilson David and are payable in advance up to \$450 for the first quarter of service. Any remainder of the fee is payable in arrears each quarter and billed at the end of that quarter. Wilson David will automatically refund the entire prepaid fee if the client terminates the account within 5 business days of opening the account. In instances when the client maintains the account for more than 5 business days prior to termination, any client who terminates the services of Wilson David after paying a management fee in advance will receive a pro-rata refund equal to the period in which they would have pre-paid fees but are no longer a client, with the exception of the fee for the first 3 months of service, which is non-refundable after the initial 5 business days of opening the account.

At the beginning of a client's relationship with Wilson David, the basic percentage fee of the assets currently under management is calculated for the upcoming year. Up to \$450 of this fee is invoiced after approximately two weeks in order to allow confirmation of the value of the assets with the broker. This amount pays for the first three months of service. The remainder of that initial fee plus the fee for the second quarter of service is billed in arrears and invoiced in the middle of the seventh month. The client fees are paid by having the fees deducted from the managed account. However, the client has the right to pay management fees with funds outside of the managed account. The custodian will provide periodic account statements to the client. Such statements will reflect all fee withdrawals by Wilson David. It is the client's responsibility to verify the accuracy of the fee calculation. The investment advisory agreement can be canceled. Any pre-payments will be refunded pro-rata, with the exception of the fee for the first 3 months of service, which is non-refundable after initial 5 business days of opening account.

Fees are deducted and (after the initial pre-paid invoice) invoices are billed in arrears and sent on a quarterly basis. Wilson David's fee schedule is as follows:

Fee as a % of Assets	On Assets (per Client):	Up to and Including Assets (per Client) :
1.25%	0	\$250,000
1.15%	\$250,001	\$500,000
1.0%	\$500,001	Unlimited

In addition to Wilson David advisory fees, clients pay fees directly to our custodian, Folio. We also offer subscription services for financial planning advice.

Additional Client Fees Charged

Clients pay fees of 0.25% of AUM directly to Folio Institutional for Folio's brokerage and administrative services. In most cases, investment management fees are deducted directly from clients' accounts by Folio, and clients receive a "notification only" bill. Additional administrative charges may be incurred by the client to Folio including mutual fund transaction fees, postage and handling and miscellaneous fees. These transaction charges are usually small and incidental to the purchase or sale of a security. Wilson David receives no part of these fees and no mark-up based on these fees.

Prepayment of Client Fees

Wilson David accepts pre-paid fees of up to \$450 a year. Statements mailed quarterly will show the fee debited from the account, the total assets under management, and the performance of the portfolio during that quarter and to date.

External Compensation for the Sale of Securities to Clients

Wilson David does not receive external compensation for the sale of securities to clients.

Custodian Fees and Other Expenses

Folio doesn't charge client an account maintenance fee for custody service but is compensated by fees of 0.25% of AUM. A one-time transfer fee may apply when transferring securities between brokers. Wilson David doesn't receive a percentage of any fee/charge from Folio.

Other Compensation

Wilson David does not receive compensation for the sale of securities or investment products. Wilson David charges fixed fees and hourly charges for financial planning and trading coaching services that are payable after services are rendered. Fees for financial plans start at \$450 for Wilson David clients with assets > \$250,000 (refund after assets transferred) and \$1,500 for non-clients; college financial plans start at \$450; student loan repayment and consolidation plans start at \$300; and financial planning and trading coaching services are \$80.00 per hour.

Item 6: Performance-Based Fees**Sharing of Capital Gains**

Wilson David does not use a performance-based fee structure. Fees are not based on a share of the capital gains or capital appreciation of managed securities.

Item 7: Types of Clients**Description**

Wilson David generally provides investment advice to individuals. Client relationships vary in scope and length of service.

Account Minimums

Wilson David does not require a minimum to open or maintain an account.

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

Methods of Analysis

Security analysis methods may include fundamental analysis, technical analysis, and cyclical analysis. Investing in securities involves risk of loss that clients should be prepared to bear. Fundamental analysis involves evaluating a stock using real data such as company revenues, earnings, return on equity, and profits margins to determine underlying value and potential growth. Technical analysis involves evaluating securities based on past prices and volume. Cyclical analysis involves analyzing the cycles of the market. The main sources of information include financial newspapers and magazines, research materials prepared by others, corporate rating services, annual reports, prospectuses, and filings with the Securities and Exchange Commission.

Wilson David incorporates both the top-down and bottom-up method. Domestic and international markets are analyzed to determine market trends (top-down method), and individual companies are reviewed to determine leaders in specific sectors (bottom-up method). Our investment strategy for many of our clients is to buy and hold. If the client requests frequent trading, we advise them of the cost and potential risk. We do not recommend securities that have unusual or significant risk. We do apprise our clients that they will always be subject to normal market and individual security risk. Our strategy of addressing material risk involves diversification and constant vigilance regarding the valuation of securities held by our clients.

Investment Strategy

The investment strategy for a specific client is based upon the objectives stated by the client during consultations. The client may change these objectives at any time. Each client executes an Investment Policy Statement or Risk Tolerance that documents their objectives and their desired investment strategy. Other strategies may include long-term purchases, short-term purchases, trading, and option writing (including covered options or spreading strategies).

Security-Specific Material Risks

All investment programs have certain risks that are borne by the investor. The specific risks associated with investment advice include:

- Risk of loss
- Client has changes in financial status or lifestyle and therefore plan recommendations are no longer valid
- Interest-rate Risk: Fluctuations in interest rates may cause investment prices to fluctuate. For example, when interest rates rise, yields on existing bonds become less attractive, causing their market values to decline.
- Market Risk: The price of a security, bond, or mutual fund may drop in reaction to tangible and intangible events and conditions. This type of risk is caused by external factors independent of a security's particular underlying circumstances. For example, political, economic and social conditions may trigger market events.
- Inflation Risk: When any type of inflation is present, a dollar today will not buy as much as a dollar next year, because purchasing power is eroding at the rate of inflation.

- **Currency Risk:** Overseas investments are subject to fluctuations in the value of the dollar against the currency of the investment's originating country. This is also referred to as exchange rate risk.
- **Reinvestment Risk:** This is the risk that future proceeds from investments may have to be reinvested at a potentially lower rate of return (i.e. interest rate). This primarily relates to fixed income securities.
- **Business Risk:** These risks are associated with a particular industry or a particular company within an industry. For example, oil-drilling companies depend on finding oil and then refining it, a lengthy process, before they can generate a profit. They carry a higher risk of profitability than an electric company, which generates its income from a steady stream of customers who buy electricity no matter what the economic environment is like.
- **Liquidity Risk:** Liquidity is the ability to readily convert an investment into cash. Assets are more liquid if many traders are interested in a standardized product. For example, Treasury Bills are highly liquid, while real estate properties are not.
- **Financial Risk:** Excessive borrowing to finance a business' operations increases the risk of profitability, because the company must meet the terms of its obligations in good times and bad.

Item 9: Disciplinary Information

Criminal or Civil Actions

Wilson David and its management/IARS have not been involved in any criminal or civil action.

Administrative Enforcement Proceedings

Wilson David and its management/IARs are not subject to any Administrative Proceedings.

Self-Regulatory Organization Enforcement Proceedings

Wilson David and its management/IARs have not been involved in legal or disciplinary events related to past or present investment clients.

Item 10: Other Financial Industry Activities and Affiliations

Broker-Dealer or Representative Registration

Wilson David is not registered as a broker dealer and none of its affiliated persons are registered representatives of a broker dealer.

Futures or Commodity Registration

Neither Wilson David nor its employees are registered or has an application pending to register as a futures commission merchant, commodity pool operator, or a commodity trading advisor.

Material Relationships Maintained by this Advisory Business and Conflicts of Interest

None

Recommendations or Selections of Other Investment Advisors and Conflicts of Interest

None

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

Code of Ethics Description

The employees of Wilson David have committed to a Code of Ethics (“Code”). The purpose of our Code is to set forth standards of conduct expected of Wilson David employees and addresses conflicts that may arise. The Code defines acceptable behavior for employees of Wilson David. The Code reflects Wilson David and its supervised persons’ responsibility to act in the best interest of their client.

One area which the Code addresses is when employees buy or sell securities for their personal accounts and how to mitigate any conflict of interest with our clients. We do not allow any employees to use non-public material information for their personal profit or to use internal research for their personal benefit in conflict with the benefit to our clients. Wilson David’s policy prohibits any person from acting upon or otherwise misusing non-public or inside information. No advisory representative or other employee, officer or director of Wilson David’s Code is based on the guiding principle that the interests of the client are our top priority. Wilson David’s officers, directors, advisors, and other employees have a fiduciary duty to our clients and must diligently perform that duty to maintain the complete trust and confidence of our clients. When a conflict arises, it is our obligation to put the client’s interests over the interests of either employees or the company.

The Code applies to “access” persons. “Access” persons are employees who have access to non-public information regarding any clients' purchase or sale of securities, or non-public information regarding the portfolio holdings of any reportable fund, who are involved in making securities recommendations to clients, or who have access to such recommendations that are non-public.

The firm will provide a copy of the Code of Ethics to any client or prospective client upon request.

Investment Recommendations Involving a Material Financial Interest and Conflict of Interest

Wilson David and its employees do not recommend to clients securities in which we have a material financial interest.

Personal Trading

Wilson David IARs may purchase equities for their personal accounts that they also recommend to clients. In such cases, the IARs will not effect transactions for their personal accounts that will be contrary to recommendations being made to clients. Further, Wilson David will not compete with clients in connection with such transactions.

Item 12: Brokerage Practices

Factors Used to Select Broker-Dealers for Client Transactions

Wilson David selected our custodian, Folio Institutional, based on its:

- Skills
- Reputation
- Dependability
- Compatibility with our clients' needs
- Competitive fees

We don't accept "soft dollars." Soft dollars are benefits that have a tangible value, even though it does not result in an exchange of money. For example, a custodian offering research or other benefits to place our clients with them is an example of "soft dollars."

We do not accept "brokerage for client referrals." Consequently, our decision to use Folio as our custodian was not based on any agreement for it to provide client referrals if we recommend it as a custodian for our existing and future clients.

Aggregating Securities Transactions for Client Accounts

Wilson David does not trade for its or its clients' accounts and therefore aggregation of securities transactions is not applicable.

Item 13: Review of Accounts

Schedule for Periodic Review of Client Accounts or Financial Plans and Advisory Persons Involved

Account reviews are performed quarterly at a minimum by IARs Kathryn Hauer and/or Martin Lunn. Account reviews are performed more frequently when market conditions dictate. A review is also done upon request of the client.

Review of Client Accounts on Non-Periodic Basis

Other conditions that may trigger a review of clients' accounts are changes in the tax laws, new investment information, and changes in a client's own situation.

Content of Client-Provided Reports and Frequency

Clients receive account statements no less than quarterly for managed accounts. Account statements are issued by Folio. The client receives confirmations of each transaction in account from Folio and an additional statement during any month in which a transaction occurs.

Item 14: Client Referrals and Other Compensation

Economic Benefits Provided to the Advisory Firm from External Sources and Conflicts of Interest

None

Advisory Firm Payments for Client Referrals

Wilson David does not compensate for client referrals.

Item 15: Custody

Account Statements

All assets are held at a qualified custodian, which means the custodian provides account statements directly to clients at their address of record at least quarterly. Our primary custodian is Folio Institutional.

Item 16: Investment Discretion

Discretionary Authority for Trading

Wilson David accepts discretionary authority to manage securities accounts on behalf of clients. This discretion is limited to timing of purchases and sales, amount of the purchase or sale and choice of securities bought or sold. Discretion also may be limited, according to the terms of the client's financial advisory agreement, as to the types of investments allowed. Clients may also place restrictions on the purchase or sale of certain securities in their accounts.

Clients who have granted discretionary trading authority to the Adviser are required to grant a "limited power of attorney" (LPOA) to Wilson David over the client's custodial account for purposes of trading and fee deduction. The client grants this authority in the brokerage account application.

The LPOA allows Folio to accept instructions from our advisers to:

- Execute trades in the client's account on the client's behalf
- Deduct management fees from the client's account
- Disburse funds to the client and mail to the client's address of record
- Disburse funds on a recurring basis or on-request to the same payee of the client's choosing after the client has signed a standing letter of instruction authorizing Folio to accept instruction from Wilson David to disburse the fund
- Determine the securities to buy and sell on the client's behalf; unless the client requests to be notified prior to executing a trade
- Determine the amount of securities to buy or sell on the client's behalf; unless the client requests to be notified prior to executing a trade

Item 17: Voting Client Securities

Proxy Votes

Wilson David does not vote proxies on securities. Clients are expected to vote their own proxies. Clients will receive their proxies directly from the custodian of their account or from a transfer agent.

Item 18: Financial Information

Balance Sheet

A balance sheet is not required to be provided because Wilson David does not serve as a custodian for client funds or securities and Wilson David does not require prepayment of fees of more than \$500 per client and six months or more in advance.

Wilson David and its management/IARs do not have any financial impairment that will preclude the firm from meeting contractual commitments to clients.

Financial Conditions Reasonably Likely to Impair Advisory Firm's Ability to Meet Commitments to Clients

Wilson David has no condition that is reasonably likely to impair our ability to meet contractual commitments to our clients.

Bankruptcy Petitions during the Past Ten Years

Neither Wilson David nor its management/IARs have had any bankruptcy petitions in the last ten years.

Item 19: Requirements for State Registered Advisors

Principal Executive Officers and Management Persons

The education and business background for all management and supervised persons can be found in the Part 2B of this Brochure.

Outside Business Activities

The outside business activities for all management and supervised persons can be found in the Part 2B of this Brochure.

Performance Based Fee Description

Wilson David does not receive any performance based fees.

Disclosure of Material Facts Related to Arbitration or Disciplinary Actions Involving Management Persons

None

Material Relationship Maintained by this Advisory Business or Management persons with Issuers of Securities

There are no material relationships with issuers of securities to disclose.

Brochure Supplement (Part 2B of Form ADV)

Wilson David Corporation

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Website – www.wilsondavid.com

Date of Brochure: February 2017

This brochure supplement provides information about Kathryn Hauer and Martin Lunn and supplements the Wilson David (CRD # 172841) brochure. Additional information about Kathryn Hauer (CRD # 6380380) and Martin Lunn (CRD # 6380672) is available on the SEC’s website at www.adviserinfo.sec.gov.

Supervised Person Brochure

- Kathryn B. Hauer, CEO
- Martin D. Lunn, COO

<p>Chief Executive Officer Kathryn B. Hauer, CFP®, EA, MBA</p>	<p>Chief Operating Officer Martin D. Lunn, MBA</p>
<p>Year of birth: 1961</p>	<p>Year of birth: 1964</p>
<p>Educational Background and Business Experience Kathryn took and passed the FINRA Series 65 exam in July 2014 under Form U-10. She is registered as an investment adviser representative in the state of South Carolina, a CERTIFIED FINANCIAL PLANNER™ (#247780) & IRS Enrolled Agent (#120307).</p> <p>Educational Background:</p> <ul style="list-style-type: none"> • M.B.A., 2004, Business Administration, University of South Carolina • M.A., English, 1985, College of William and Mary • B.A., English, 1983, College of William and Mary, Phi Beta Kappa • Certificate, CFP course, UGA Terry School of Business, 2014 	<p>Educational Background and Business Experience Martin took and passed the FINRA Series 65 exam in February 2014 under Form U-10. He is registered as an investment adviser representative in the state of South Carolina.</p> <p>Educational Background:</p> <ul style="list-style-type: none"> • M.B.A., 2004, Business Administration, University of South Carolina • B.S., Biology, Minor Chemistry, 1987, University of Connecticut

Kathryn B. Hauer (cont'd)	Martin D. Lunn (cont'd)
<p>Business Experience:</p> <ul style="list-style-type: none"> • Project Consultant, Brady & Assoc., 2013 – 2014 • Asst. Project Manager, MDM Services Corporation/MACTEC, 1999 – 2013 • Adjunct Business Communications Professor, University of South Carolina - Aiken, 2007 – Present 	<p>Business Experience:</p> <ul style="list-style-type: none"> • Owner, Construction Management Consulting, Green Shores South Corporation, 2012 – present • Vice President, MDM Services Corporation, 2003 – 2014 • Program Manager, MDM Services Corporation/MACTEC, 1998 - 2003
<p>Disciplinary Information None to report</p>	<p>Disciplinary Information None to report</p>
<p>Other Investment-Related Business Activities None</p>	<p>Other Investment-Related Business Activities None</p>
<p>Supervision Since Kathryn Hauer and Martin Lunn are the sole owners of Wilson David, they are solely responsible for all supervision and formulation and monitoring of investment advice offered to clients. They will adhere to Wilson David's compliance policies and procedures.</p>	<p>Supervision Since Kathryn Hauer and Martin Lunn are the sole owners of Wilson David, they are solely responsible for all supervision and formulation and monitoring of investment advice offered to clients. They will adhere to Wilson David's compliance policies and procedures.</p>
<p>Requirements for State-Registered Advisors Arbitration Claims: None Self-Regulatory Organization or Administrative Proceeding: None Bankruptcy Petition: None</p>	<p>Requirements for State-Registered Advisors Arbitration Claims: None Self-Regulatory Organization or Administrative Proceeding: None Bankruptcy Petition: None</p>

Additional Business Activities (not related to investment advising)

Kathryn and Martin work full time as Investment Advisor Representatives for Wilson David. Wilson David is the primary business for both of us. In addition, Kathryn teaches one class of Freshman English each semester at the University of South Carolina – Aiken as an Adjunct English professor and one class at Aiken Tech. This activity requires less than 12 hours/week of her time. During tax season, Kathryn works as a Tax Pro for H&R Block for less than 8 hours per week. Martin provides services as a Construction Management Consultant for Department of Energy projects through his corporation, Greenshores South; this work requires less than 8 hours/week of his time.