

Firm Brochure

(Part 2A of Form ADV)

SALVINI FINANCIAL PLANNING
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This brochure provides information about the qualifications and business practices of SALVINI FINANCIAL PLANNING. If you have any questions about the contents of this brochure, please contact us at: (805) 543-6622, or by email at: brooke@SalviniFinancial.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 SALVINI FINANCIAL PLANNING is available on the SEC's website at www.adviserinfo.sec.gov

March 26, 2018

Material Changes

Annual Update

The Material Changes section of this brochure will be updated annually when material changes occur since the previous release of the Firm Brochure.

Material Changes since the Last Update

No material changes since most recent previous update.

Full Brochure Available

Whenever you would like to receive a complete copy of our Firm Brochure, please contact us by telephone at: (805) 543-6622 or by email at: brooke@salvinifinancial.com.

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Advisory Business

Firm Description

SALVINI FINANCIAL PLANNING, (“FIRM NAME”) was founded in 2006.

SALVINI FINANCIAL PLANNING provides fee-only, hourly, project, and retainer based, financial planning and investment advisory services to individuals and families, small businesses, pension and profit sharing plans, non-profit organizations, trusts, and estates. These advisory services can be general in nature or focused on particular areas of interest or need, depending on each Client's unique circumstances.

Advice is provided through consultation with the client and may include: determination of goals and financial objectives, identification of financial problems, cash flow management, debt management, tax planning, risk management, investment management, education funding, retirement planning, and estate planning.

SALVINI FINANCIAL PLANNING does not receive commissions for purchasing or selling annuities, insurance, stocks, bonds, mutual funds, limited partnerships, or other commissioned products. The firm is not affiliated with entities that sell financial products or securities. No commissions in any form are accepted. No finder's fees are accepted.

SALVINI FINANCIAL PLANNING conducts an initial interview at which the scope of the engagement is mutually determined by the Client and the Advisor. Once the scope of work is determined, an analysis of the current financial situation is prepared. The analysis and a summary of the significant observations, assumptions and recommendations within the scope of the engagement are presented to the Client. The Client is responsible for implementing and monitoring any recommendations included in the financial plan. Clients may request and engage Salvini Financial Planning as needed to assist with implementation, provide investment monitoring and/or provide periodic financial check-ups. It is the Client's responsibility to initiate check-ups and additional reviews.

Other professionals (e.g., lawyers, accountants, insurance agents, etc.) are engaged directly by the client on an as-needed basis. Conflicts of interest will be disclosed to the client in the unlikely event they should occur.

The initial Get Acquainted meeting (not to exceed 30 minutes), which may be by telephone or video conference, is complimentary and is considered an exploratory interview to determine the extent to which financial planning and investment management may be beneficial to the client.

Principal Owner

Brooke A. Salvini - 100% owner

Types of Advisory Services

SALVINI FINANCIAL PLANNING furnishes investment advice through consultations.

On more than an occasional basis, SALVINI FINANCIAL PLANNING furnishes advice to clients on matters not involving securities, such as financial planning matters, taxation issues, and trust services that often include estate planning.

As of December 31, 2017, SALVINI FINANCIAL PLANNING does not offer continuous and ongoing management of assets on either a discretionary or non-discretionary basis but has provided investment recommendations on a consultative basis for approximately 85 clients and investment monitoring with non-discretionary implementation to 6 clients.

Tailored Relationships

The goals and objectives for each client are documented in our client relationship management system. If appropriate, investment policy statements are created that reflect the stated goals and objective. Clients may impose restrictions on investing in certain securities or types of securities.

Agreements may not be assigned without client consent.

Types of Agreements

The following agreements define the typical client relationships.

Hourly Planning Agreement

SALVINI FINANCIAL PLANNING makes hourly planning services available to all clients on an as needed basis regardless of the scope of engagement. Salvini Financial Planning's hourly rate is \$235.

Financial Planning Agreement

A financial plan is designed to help the client with all aspects of financial planning without ongoing investment management after the financial plan is completed.

The financial plan may include, but is not limited to: a net worth statement; a cash flow statement; a review of investment accounts, including reviewing asset allocation and providing repositioning recommendations; strategic tax planning; a review of retirement accounts and plans including recommendations; a review of insurance policies and recommendations for changes, if necessary; one or more retirement scenarios; estate planning review and recommendations; and education planning with funding recommendations.

Detailed investment advice and specific recommendations are provided as part of a financial plan. Implementation of the recommendations is at the discretion of the client.

The price for a financial plan is predicated upon the facts known at the start of the engagement. The price for a financial plan is based on our hourly rate of \$235 and an estimate of the hours to complete the plan. The price for most financial plans is generally in the range of \$2,820 - \$4,700 and is not negotiable. Since financial planning is a discovery process, situations occur wherein the client is unaware of certain financial exposures or predicaments.

In the event that the client's situation is substantially different than disclosed at the initial meeting, a revised price will be provided for mutual agreement. The client must approve the change of scope in advance of the additional work being performed when a price increase is necessary.

After delivery of a financial plan, subsequent work and implementation assistance is billed separately at the rate of \$235 per hour. Clients are encouraged to obtain an annual Financial Check Up which is billed at the rate of \$235 per hour or a fixed price agreement.

Investment Monitoring Agreement

Some clients choose to have SALVINI FINANCIAL PLANNING monitor select investment accounts in order to obtain periodic investment and rebalancing advice. Clients that elect this service open accounts at TD Ameritrade institutional.

The minimum quarterly price is \$705 and is not negotiable. Current client relationships may exist where the prices are higher or lower than the price schedule above. Planning work in addition to investment monitoring will be billed at the hourly rate of \$235.

Although the Investment Monitoring Agreement is an ongoing agreement, the length of service to the client is at the client's discretion. The client or SALVINI FINANCIAL PLANNING may terminate or alter the monitoring arrangement by written notice to the other party. At termination, fees will be billed for the last quarter completed.

Retainer Agreement

In some circumstances, a client may wish to retain SALVINI FINANCIAL PLANNING on an annual basis to provide ongoing financial planning advice not specifically related to investments but which could include investment advice. The minimum annual price for a Retainer Agreement is \$4,700 and is not negotiable.

Tax Preparation Agreement

Tax preparation work is performed separately from other financial planning or investment monitoring work. It is billed at a rate of \$235 per hour. The minimum

price for a tax preparation engagement is \$411.25. Eligible federal and applicable state returns are filed electronically without an additional fee.

Pension and Profit Sharing Plan Agreement

Small businesses may retain SALVINI FINANCIAL PLANNING to recommend a retirement plan for their business or review an existing plan. This engagement could include, but is not limited to, the type of retirement plan, investment options within the plan, identifying qualified third party administrators and custodians, and employee education. The price for this type of agreement is typically in the range of \$3,535 - \$5,875 and is not negotiable. Annual employee education and annual review of plan investment options is billed on a per project or hourly basis.

Termination of Agreement

A Client may terminate any of the aforementioned agreements at any time by notifying SALVINI FINANCIAL PLANNING in writing and paying the rate for the time spent on the engagement prior to notification of termination. If the client made an advance payment, SALVINI FINANCIAL PLANNING will refund any unearned portion of the advance payment.

SALVINI FINANCIAL PLANNING may terminate any of the aforementioned agreements at any time by notifying the client in writing. If the client made an advance payment, SALVINI FINANCIAL PLANNING will refund any unearned portion of the advance payment.

Prices and Compensation

Description

SALVINI FINANCIAL PLANNING bases its prices on hourly charges, projects, and fixed prices.

Agreements are generally priced based on the complexity of work reflected by our estimate of hours required to complete the engagement.

Financial plans are priced according to the degree of complexity associated with the client's situation.

SALVINI FINANCIAL PLANNING may occasionally conduct workshops or webinars for which a fixed price would be charged. These prices could range from \$25 - \$470.

SALVINI FINANCIAL PLANNING may make financial planning materials available in office or through the website www.SalviniFinancial.com. The price of these materials could range from \$10 to \$470.

Prices are not negotiable. On occasion, SALVINI FINANCIAL PLANNING will offer a valued client discount or a discount associated with a special event. Any such discounts are determined at the sole discretion of SALVINI FINANCIAL PLANNING.

Billing

A deposit for initial engagements is required in the amount of the lesser of \$500 or ½ of the lower end of the estimated project price. Projects spanning more than three months may be billed quarterly. Fees are not collected for services to be provided more than 6 months in advance. Investment monitoring fees are billed in advance, meaning that we invoice you before the three-month billing period has ended. Payment in full is expected upon invoice presentation or completion of a project.

Other Fees

Custodians may charge transaction fees on purchases or sales of certain mutual funds and exchange-traded funds. These transaction charges are usually small and incidental to the purchase or sale of a security. The selection of the security is more important than the nominal fee that the custodian charges to buy or sell the security.

Expense Ratios

Mutual funds generally charge a management fee for their services as investment managers. The management fee is called an expense ratio. For example, an expense ratio of 0.50 means that the mutual fund company charges 0.5% for their services. These fees are in addition to the fees paid by you to SALVINI FINANCIAL PLANNING.

Performance figures quoted by mutual fund companies in various publications are after their fees have been deducted.

Past Due Accounts and Termination of Agreement

SALVINI FINANCIAL PLANNING reserves the right to stop work on any account that is more than 30 days overdue. In addition, SALVINI FINANCIAL PLANNING reserves the right to terminate any financial planning engagement where a client has willfully concealed or has refused to provide pertinent information about financial situations when necessary and appropriate, in SALVINI FINANCIAL PLANNING's judgment, to providing proper financial advice. Any unused portion of fees collected in advance will be refunded within 30 days.

Performance-Based Fees

Sharing of Capital Gains

Fees are not based on a share of the capital gains or capital appreciation of managed securities.

SALVINI FINANCIAL PLANNING does not use a performance-based fee structure because of the potential conflict of interest. Performance-based

compensation may create an incentive for the adviser to recommend an investment that may carry a higher degree of risk to the client.

Types of Clients

Description

SALVINI FINANCIAL PLANNING generally provides investment advice to individuals, families, small businesses, pension and profit sharing plans, trusts, estates, or charitable organizations, and corporations.

Client relationships vary in scope and length of service.

Account Minimums

SALVINI FINANCIAL PLANNING offers advice without regard to net worth, account, or income minimums.

Methods of Analysis, Investment Strategies and Risk of Loss

Methods of Analysis

Fundamental analysis is applied.

The main sources of information include financial newspapers, magazines, and websites, research materials prepared by others, corporate rating services, annual reports, prospectuses, filings with the Securities and Exchange Commission, and company press releases.

Other sources of information that SALVINI FINANCIAL PLANNING may use include Morningstar Advisor Workstation, Vanguard Advisor, TD Ameritrade Institutional, FinaMetrica, and the World Wide Web.

Investment Strategies

The primary investment strategy recommended for client accounts is strategic asset allocation. We primarily recommend no-load mutual and exchange-traded funds. These funds may be passively or actively managed. Client's existing stock and bond holdings may be used in the strategy. Diversification in both domestic and global markets is the key strategy employed to manage portfolio volatility. Discount brokers or direct ownership are recommended for the custody of assets.

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. The strategy is expressed in the Investment Policy Statement, Target Asset Allocation Section of the Summary Report, or in a separate document.

Other strategies may include long-term purchases, short-term purchases, trading, short sales, margin transactions, and option writing (including covered options, uncovered options or spreading strategies).

Investments may also include: equities (stocks), warrants, corporate debt securities, commercial paper, certificates of deposit, municipal securities, investment company securities (variable life insurance, variable annuities, and mutual funds shares), U. S. government securities, options contracts, futures contracts, and interests in partnerships.

Initial public offerings (IPOs) are not available through SALVINI FINANCIAL PLANNING.

Risk of Loss

All investment programs have certain risks that are borne by the investor. Our investment approach constantly keeps the risk of loss in mind. Investors face the following investment risks:

- **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. Generally, 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. During periods of financial stress, the inability to meet loan obligations may result in bankruptcy and/or a declining market value.

Disciplinary Information

Legal and Disciplinary

The firm and its employees have not been involved in legal or disciplinary events related to past or present investment clients.

Other Financial Industry Activities and Affiliations

Financial Industry Activities

SALVINI FINANCIAL PLANNING is a financial planning firm. Tax preparation services are also available on a limited basis.

Affiliations

SALVINI FINANCIAL PLANNING is a member of the Garrett Planning Network (GPN), an international network of fee-only financial planners, a member of the California Society of CPA's State Financial Planning Committee, and the AICPA Personal Financial Planning Section. The primary purpose of these affiliations is to provide education, operational guidance, technical support and professional affiliation for financial planners. SALVINI FINANCIAL PLANNING is listed on the GPN website at www.garrettplanningnetwork.com and the AICPA website at www.aicpa.org. SALVINI FINANCIAL PLANNING may receive referrals from the website listings. Operational fees may be paid to GPN, CalCPA, and the AICPA, but no fees are paid for referrals.

SALVINI FINANCIAL PLANNING may provide referrals to other Investment Advisory firms and various professionals as a service to Clients. SALVINI FINANCIAL PLANNING does not have agreements with or receive referral fees from any other Advisors or Professionals.

None of the affiliations noted above create a material conflict of interest with clients.

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

Code of Ethics

The employees of SALVINI FINANCIAL PLANNING adhere to the American Institute of Certified Public Accountants code of Ethics and Certified Financial Planner Board of Standards, Inc. Code of Ethics. The firm will provide a copy of the Code of Ethics to any client or prospective client upon request.

Participation or Interest in Client Transactions

SALVINI FINANCIAL PLANNING and its employees may buy or sell securities that are also held by clients. Employees may not trade their own securities ahead of client trades. Employees comply with the provisions of the SALVINI FINANCIAL PLANNING Compliance Manual.

Personal Trading

The Chief Compliance Officer of SALVINI FINANCIAL PLANNING is Brooke A. Salvini. The Compliance Officer maintains the required personal securities transaction records. At no time will employees receive preferential treatment over clients. Since most employee trades are small mutual fund trades or exchange-traded fund trades, the trades do not affect the securities markets.

Brokerage Practices

Selecting Brokerage Firms

SALVINI FINANCIAL PLANNING maintains an institutional account with TD Ameritrade and will recommend this brokerage when appropriate for the needs of the client. All specific custodian recommendations are made to Clients based on their need for such services. SALVINI FINANCIAL PLANNING recommends custodians based on the proven integrity and financial responsibility of the firm and the best execution of orders at reasonable commission rates.

SALVINI FINANCIAL PLANNING recommends discount brokerage firms such as Charles Schwab, Vanguard, and TD Ameritrade. SALVINI FINANCIAL PLANNING uses the information made available to investment advisors through Vanguard, TD Ameritrade, and other websites. There is no charge for the use of this information.

SALVINI FINANCIAL PLANNING does not receive fees or commissions from any of these arrangements.

Best Execution

Trading fees charged by the custodians are reviewed periodically. SALVINI FINANCIAL PLANNING does not receive any portion of the trading fees.

Soft Dollars

SALVINI FINANCIAL PLANNING may receive non-cash benefits from discount brokers and other professionals recommended to Clients. These benefits might include discounts on investment research, educational materials, educational meetings, and software. It is the policy of SALVINI FINANCIAL PLANNING to restrict non-cash (soft dollar) compensation to products and services that directly enhance the ability of SALVINI FINANCIAL PLANNING to render quality advice to clients. SALVINI FINANCIAL PLANNING receives the benefit of discounts negotiated by Garrett Planning Network, CalCPA, and/or AICPA on products and services that enhance our ability to render quality advice to Clients.

Occasionally SALVINI FINANCIAL PLANNING may partner with other financial planners, professionals, discount brokers, mutual funds and other financial institutions to sponsor educational seminars for the public. Any cash received from sponsoring partners is used to off-set expenses associated with bringing the financial education seminars to the public. These expenses include seminar materials, conference room rental, advertising, etc.

Order Aggregation

Clients implement all investment recommendations, occasionally with the assistance of SALVINI FINANCIAL PLANNING, therefore order aggregation is not applicable.

Review of Accounts

Periodic Reviews

Services are provided on an hourly, per project, or fixed price basis. The engagement terminates upon the delivery of the plan or advice to Client unless the Client requests ongoing services as specified in Service Agreement.

For all other Clients, Periodic Financial Check-Ups are recommended. It is the responsibility of the Client to initiate all such reviews. Reminders to schedule a Financial Check-Up may be sent by SALVINI FINANCIAL PLANNING.

Review Triggers

Reviews are initiated by the client unless ongoing services agreed upon. SALVINI FINANCIAL PLANNING may contact clients regarding changes in the tax laws, new investment information, and or other information to encourage a client to schedule a Financial Check-Up.

Regular Reports

SALVINI FINANCIAL PLANNING does not provide regular on-going reports to clients. Portfolio “snapshots” are provided if SALVINI FINANCIAL PLANNING is engaged to provide asset allocation, investment advice, or monitoring. Financial

planning recommendations are provided to the client at the time of engagement and at Financial Check-Ups.

Active clients receive periodic communications on at least an annual basis.

Client Referrals and Other Compensation

Incoming Referrals

SALVINI FINANCIAL PLANNING has been fortunate to receive many client referrals over the years. The referrals came from current clients, estate planning attorneys, accountants, employees, personal friends of employees and other similar sources. The firm does not compensate referring parties for these referrals.

Referrals Out

SALVINI FINANCIAL PLANNING does not accept referral fees or any form of remuneration from other professionals when a prospect or client is referred to them.

Other Compensation

SALVINI FINANCIAL PLANNING may receive compensation for occasional speaking engagements.

Custody

Account Statements

All assets are held at qualified custodians, which means the custodians provide account statements directly to clients at their address of record at least quarterly.

Performance Reports

Clients are urged to compare the account statements received directly from their custodians to any performance information that might be provided by SALVINI FINANCIAL PLANNING.

Net Worth Statements

Clients maybe provided net worth statements and net worth graphs that are generated from our client relationship management system. Net worth statements contain approximations of bank account balances provided by the client, as well as the value of land and hard-to-price real estate. The net worth statements are used for long-term financial planning where the exact values of assets are not material to the financial planning tasks.

Investment Discretion

Discretionary Authority for Trading

SALVINI FINANCIAL PLANNING does not accept discretionary authority to manage securities accounts on behalf of clients. Clients may request implementation assistance including opening accounts at TD Ameritrade Institutional. All assistance is provided on a non-discretionary basis at the direction of clients.

Limited Power of Attorney

Occasionally a client may request SALVINI FINANCIAL PLANNING speak directly to one of their financial service providers or would like to give SALVINI FINANCIAL PLANNING “view only” ability on an account. A limited power of attorney is an authorization for this purpose. A client signs a limited power of attorney so that we may speak with a provider or view account information. No authority is given to make changes.

Voting Client Securities

Proxy Votes

SALVINI FINANCIAL PLANNING does not vote proxies on securities. Clients are expected to vote their own proxies.

When assistance on voting proxies is requested, SALVINI FINANCIAL PLANNING will provide recommendations to the Client. If a conflict of interest exists, it will be disclosed to the Client.

Financial Information

Financial Condition

SALVINI FINANCIAL PLANNING does not have any financial impairment that will preclude the firm from meeting contractual commitments to clients.

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

Business Continuity Plan

General

SALVINI FINANCIAL PLANNING has a Business Continuity Plan in place that provides detailed steps to mitigate and recover from the loss of office space, communications, services or key people.

Disasters

The Business Continuity Plan covers natural disasters such as earthquakes, fire, and flooding. The Plan covers man-made disasters such as loss of electrical power, loss of water pressure, bomb threat, nuclear emergency, chemical event, biological event, T-1 communications line outage, Internet outage, railway accident and aircraft accident. Electronic files are backed up and archived on a regular schedule.

Alternate Offices

Alternate offices are identified to support ongoing operations in the event the main office is unavailable. It is our intention to contact all clients within five days of a disaster that dictates moving our office to an alternate location.

Loss of Key Personnel

In the event of Brooke A. Salvini's serious disability or death, the staff of SALVINI FINANCIAL PLANNING will assist clients with the location of an advisor through the Garrett Planning Network or other professional associations.

Information Security Program

Information Security

SALVINI FINANCIAL PLANNING maintains an information security program to reduce the risk that your personal and confidential information may be breached.

Privacy Notice

SALVINI FINANCIAL PLANNING is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us.

The categories of nonpublic information that we collect from you may include information about your personal finances, information about your health to the extent that it is needed for the financial planning process, information about transactions between you and third parties, and information from consumer reporting agencies, e.g., credit reports. We use this information to help you meet your personal financial goals.

With your permission, we disclose limited information to attorneys, accountants, and mortgage lenders with whom you have established a relationship. You may

opt out from our sharing information with these nonaffiliated third parties by notifying us at any time by telephone, mail, fax, email, or in person. With your permission, we share a limited amount of information about you with your brokerage firm in order to execute securities transactions on your behalf.

We maintain a secure office to ensure that your information is not placed at unreasonable risk. We employ a firewall barrier, secure data encryption techniques and authentication procedures in our computer environment.

We do not provide your personal information to mailing list vendors or solicitors. We require strict confidentiality in our agreements with unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors. Federal and state securities regulators may review our Company records and your personal records as permitted by law.

Personally identifiable information about you will be maintained while you are a client, and for the required period thereafter that records are required to be maintained by federal and state securities laws. After that time, information may be destroyed.

We will notify you in advance if our privacy policy is expected to change. We are required by law to deliver this Privacy Notice to you annually, in writing.

Brochure Supplement (Part 2B of Form ADV)

Education and Business Standards

SALVINI FINANCIAL PLANNING requires that advisors in its employ have a bachelor's degree and further coursework demonstrating knowledge of financial planning and tax planning. Examples of acceptable coursework include: an MBA, a CFP®, a CFA, a ChFC, JD, CTFA, EA or CPA/PFS. Additionally, advisors must have work experience that demonstrates their aptitude for financial planning and investment management.

Professional Certifications

Employees have earned certifications and credentials that are required to be explained in further detail.

Certified Financial Planner (CFP): Certified Financial Planners are licensed by the CFP Board to use the CFP mark. CFP certification requirements:

- Bachelor's degree from an accredited college or university.
- Completion of the financial planning education requirements set by the CFP Board (www.cfp.net).
- Successful completion of the 10-hour CFP® Certification Exam.
- Three-year qualifying full-time work experience.
- Successfully pass the Candidate Fitness Standards and background check.

Certified Public Account /Personal Financial Specialist (CPA/PFS): Personal Financial Specialists must hold a valid CPA license and are additionally certified by the American Institute of Certified Public Accountants to be specialists in the area of personal finance. PFS certification requirements:

- Hold a bachelor's degree from an accredited institution. As part of or in addition to, the CPA/PFS must complete 80 hours of personal financial planning education.
- Complete a minimum of 60 hours of personal financial planning continuing education every 3 years.
- Have 2 years of full time experience in personal financial planning.
- Successful completion of a personal financial planning examination; either the Personal Financial Specialist exam, the Certified Financial Planner exam, or the Chartered Financial Consultant exam.
- Agree to adhere to and sign the certification agreement and any additional documentation requested by the AICPA.

Brooke A. Salvini, CPA/PFS, CFP®

Educational Background:

- Date of birth: January 16, 1960
- Pepperdine University BS Business/Accounting 1981
- Certified Public Accountant 1984
- Certified Financial Planner Certification Exam (Passed 2005)
- AICPA Personal Financial Specialist 2006
- Certified Financial Planner 2009

Business Experience:

- Salvini Financial Planning 2006 – present
- Salvini Financial Consulting 1999 – 2006
- Nissan Motor Corporation in USA 1984 – 1992
- Rogers, Cullen, Couch & Weibe, CPA's 1983 – 1984
- Deloitte, Haskins and Sells (now Deloitte and Touche) 1981 - 1983

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Arbitration Claims: None

Self-Regulatory Organization or Administrative Proceeding: None

Bankruptcy Petition: None