



CURRAN

Financial Partners

115 River Landing Drive, Suite 200

Daniel Island, SC 29492

(843) 300-1182

Form ADV Part 2B – Brochure Supplement

For

Adam Curran

President

This brochure supplement provides information about Adam Curran that supplements the Curran Financial Partners, LLC (“CFP”) brochure. A copy of that brochure precedes this supplement. Please contact Matthew Giggey if the CFP brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Adam Curran is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 5318690.

Curran Financial Partners, LLC
115 River Landing Drive, Suite 200
Daniel Island, SC 29492

(843) 300-1182
adam@curranfinancialpartners.com



Item 2: Educational Background and Business Experience

Adam Curran

Born: 1982

Educational Background

- 2005 – Drexel University, Bachelor of Science, Business Administration

Designations

CFP® - Certified Financial Planner

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 Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of 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.

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’s studies have determined as 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 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 in order to maintain the right to continue to use the CFP® marks:

- i. 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
- ii. 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 CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business Experience

- 01/2016 – Present, Curran Financial Partners, LLC, President
- 10/2019 – Present, B&B Media Group, LLC, Managing Member
- 08/2013 – 12/2016, Global Financial, Investment Advisor Representative
- 04/2008 – 08/2013, Trustmont Advisory Group, Inc. Investment Advisor Representative
- 02/2008 – 08/2013, Trustmont Financial Group, Inc., Registered Representative
- 03/2007 – 12/2007, GunnAllen Financial, Inc., Broker Assistant
- 09/2005 – 11/2006, Veritable LP, Portfolio Accounting
- 08/2003 – 09/2005, Susquehanna Investment Group, Risk Management Department

Item 3: Disciplinary Information

No management person at Curran Financial Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Adam Curran is Managing Member of B&B Media Group, LLC which is a consultant and media buying specialist for Curran Financial Partners. Mr. Curran spends approximately 5 hours per month on this activity. Adam Curran is licensed to sell life and health insurance and may engage in product sales with our clients, for which CFP will receive additional compensation. This does create an incentive to recommend these products based on compensation and not client need, however careful review is done to ensure that recommendations are made in the best interests of the client. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under CFP.

Item 5: Additional Compensation

Adam Curran does not receive any economic benefit from any person, company, or organization, other than Curran Financial Partners, LLC in exchange for providing clients advisory services through Curran Financial Partners, LLC.

Item 6: Supervision

Matthew Giggey, as Chief Compliance Officer of CFP, is responsible for supervision. He may be contacted at mgiggey@curranfinancialpartners.com.



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Form ADV Part 2B – Brochure Supplement

For

Christine M. Kriegl

Investment Adviser Representative

This brochure supplement provides information about Christine M. Kriegl that supplements the Curran Financial Partners, LLC (“CFP”) brochure. A copy of that brochure precedes this supplement. Please contact Matthew Giggey if the CFP brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Christine M. Kriegl is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 3104999.

Curran Financial Partners, LLC
672 Marina Drive, Suite 108
Charleston, SC 29492
(843) 300-1182
christine@curranfinancialpartners.com

Item 2: Educational Background and Business Experience

Christine M. Kriegl

Born: 1972

Educational Background

- Christine Marie Kriegl has not received any higher education degrees after high school.

Business Experience

- 04/2022 – Present, Curran Financial Partners, LLC, Investment Adviser Representative
- 04/2022 – Present, Curran Financial Partners, LLC, Wealth Manager
- 02/2021 – 04/2022, Fidelity Investments, High Net Worth II Associate
- 03/2016 – 02/2021, Andrea Riley Arnesen Franchise of Ameriprise, Paraplanner

Item 3: Disciplinary Information

No management person at Curran Financial Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Christine M. Kriegl is licensed to sell life and health insurance and may engage in product sales with our clients, for which CFP will receive additional compensation. This does create an incentive to recommend these products based on compensation and not client need, however careful review is done to ensure that recommendations are made in the best interests of the client. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under CFP

Item 5: Additional Compensation

Christine M. Kriegl does not receive any economic benefit from any person, company, or organization, other than Curran Financial Partners, LLC in exchange for providing clients advisory services through Curran Financial Partners, LLC.

Item 6: Supervision

Adam Curran, as Chief Executive Officer of CFP, is responsible for supervision. He may be contacted at adam@curranfinancialpartners.com.



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Form ADV Part 2B – Brochure Supplement

For

Christopher N. McQuade

Investment Adviser Representative

This brochure supplement provides information about Christopher N. McQuade that supplements the Curran Financial Partners, LLC (“CFP”) brochure. A copy of that brochure precedes this supplement. Please contact Matthew Giggey if the CFP brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Christopher N. McQuade is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 2085253.

Curran Financial Partners, LLC
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Charleston, SC 29492
(843) 300-1182
christopher@curranfinancialpartners.com

September 5, 2023



Item 2: Educational Background and Business Experience

Christopher N. McQuade

Born: 1968

Educational Background

- 1986-1990, Niagara University, Bachelor of Science, Marketing

Business Experience

- 02/2019 – Present, Curran Financial Partners, LLC, Investment Adviser Representative
- 07/2017 – 02/2019, Pruco Securities, LLC, Registered Representative
- 03/2017 – 06/2017, Allstate, Insurance Sales
- 09/2015 – 03/2017, Healthmarkets, Insurance Sales
- 02/2011 – 06/2014, Choice Energy, Energy Futures Broker
- 04/2005 – 02/2011, GFI Securities, LLC, High Yield Broker
- 09/1999 – 04/2005, GFI Securities, LLC, Electricity Broker

Item 3: Disciplinary Information

No management person at Curran Financial Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Christopher N. McQuade is licensed to sell life and health insurance and may engage in product sales with our clients, for which CFP will receive additional compensation. This does create an incentive to recommend these products based on compensation and not client need, however careful review is done to ensure that recommendations are made in the best interests of the client. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under CFP.

Item 5: Additional Compensation

Christopher N. McQuade does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through CFP.

Item 6: Supervision

Adam Curran, as Chief Executive Officer of CFP, is responsible for supervision. He may be contacted at adam@curranfinancialpartners.com.



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Form ADV Part 2B – Brochure Supplement

For

Colin J. Stewart

Investment Adviser Representative

This brochure supplement provides information about Colin J. Stewart that supplements the Curran Financial Partners, LLC (“CFP”) brochure. A copy of that brochure precedes this supplement. Please contact Matthew Giggey if the CFP brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Colin J. Stewart is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 6701258.

Curran Financial Partners, LLC
115 River Landing Drive, Suite 200
Daniel Island, SC 29492

(843) 300-1182
colin@curranfinancialpartners.com



Item 2: Educational Background and Business Experience

Colin J. Stewart

Born: 1994

Educational Background

- 2012 – 2016, The College of Saint Rose, Bachelor of Science, Business Administration

Designations

CFP® - Certified Financial Planner

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- 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 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 in order to maintain the right to continue to use the CFP® marks:

- i. 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
- ii. 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 CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business Experience

- 01/2019 – Present, Curran Financial Partners, LLC, Investment Adviser Representative
- 09/2018 – 01/2019, South State Investment Services, Client Services Associate
- 04/2017 – 08/2018, Marshall & Sterling Wealth Advisors, Registered Representative
- 10/2016 – 03/2017, Northwestern Mutual, Financial Representative

Item 3: Disciplinary Information

No management person at Curran Financial Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Colin J. Stewart is licensed to sell life and health insurance and may engage in product sales with our clients, for which CFP will receive additional compensation. This does create an incentive to recommend these products based on compensation and not client need, however careful review is done to ensure that recommendations are made in the best interests of the client. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under CFP.

Item 5: Additional Compensation

Colin J. Stewart does not receive any economic benefit from any person, company, or organization, other than Curran Financial Partners, LLC in exchange for providing clients advisory services through Curran Financial Partners, LLC.

Item 6: Supervision

Adam Curran, as Chief Executive Officer of CFP, is responsible for supervision. He may be contacted at adam@curranfinancialpartners.com.





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Form ADV Part 2B – Brochure Supplement

For

David Coors Sheaffer

Investment Adviser Representative

This brochure supplement provides information about David Coors Sheaffer that supplements the Curran Financial Partners, LLC (“CFP”) brochure. A copy of that brochure precedes this supplement. Please contact Matthew Giggey if the CFP brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about David Coors Sheaffer is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 6560307.

Curran Financial Partners, LLC
115 River Landing Drive, Suite 200
Daniel Island, SC 29492

(843) 300-1182
david@curranfinancialpartners.com



Item 2: Educational Background and Business Experience

David Sheaffer

Born: 1992

Educational Background

2015, Bachelor's Business Management, Southern Methodist University – 2015

Business Experience

- 03/2022 – Present, Curran Financial Partners, LLC, Investment Adviser Representative
- 09/2015 – 03/2022, Putnam Investments, Wholesaler

Item 3: Disciplinary Information

No management person at Curran Financial Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

David Coors Sheaffer is not involved with outside business activities.

Item 5: Additional Compensation

David Coors Sheaffer does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through CFP.

Item 6: Supervision

Adam Curran, as Chief Executive Officer of CFP, is responsible for supervision. He may be contacted at adam@curranfinancialpartners.com.



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Form ADV Part 2B – Brochure Supplement

For

Frank Gerard Passalaqua

Investment Adviser Representative

This brochure supplement provides information about Frank Gerard Passalaqua that supplements the Curran Financial Partners, LLC (“CFP”) brochure. A copy of that brochure precedes this supplement. Please contact Matthew Giggey if the CFP brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Frank Gerard Passalaqua is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 2353514.

Curran Financial Partners, LLC 115
River Landing Drive, Suite 200
Daniel Island, SC 29492
(843) 300-1182
frank@curranfinancialpartners.com

Item 2: Educational Background and Business Experience

Frank Gerard Passalaqua

Born: 1968

Educational Background

- 1990 – Saint Peters, Bachelor of Science, Marketing

Business Experience

- 08/2021 – Present, Curran Financial Partners, LLC, Investment Adviser Representative
- 01/2021 – Present, Curran Financial Partners, LLC, Paraplanner
- 02/2020 – 01/2021, Guaranteed Rate Affinity, VP Loan Officer
- 01/2019 – 01/2020, Parker Lending LLC, Loan Officer
- 10/2017 – 11/2018, Queen Street Hospitality, Operations Manager
- 03/2011 – 08/2017, Buckman, Buckman & Reid, Equities Sales Trader

Item 3: Disciplinary Information

No management person at Curran Financial Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Frank Gerard Passalaqua is licensed to sell life and health insurance and may engage in product sales with our clients, for which CFP will receive additional compensation. This does create an incentive to recommend these products based on compensation and not client need, however careful review is done to ensure that recommendations are made in the best interests of the client. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under CFP.

Item 5: Additional Compensation

Frank Gerard Passalaqua does not receive any economic benefit from any person, company, or organization, other than Curran Financial Partners, LLC in exchange for providing clients advisory services through Curran Financial Partners, LLC.

Item 6: Supervision

Adam Curran, as Chief Executive Officer of CFP, is responsible for supervision. He may be contacted at adam@curranfinancialpartners.com.



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Financial Partners

115 River Landing Drive, Suite 200
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Form ADV Part 2B – Brochure Supplement

For

Joseph M Iafelice

Investment Adviser Representative

This brochure supplement provides information about Joseph M. Iafelice that supplements the Curran Financial Partners, LLC (“CFP”) brochure. A copy of that brochure precedes this supplement. Please contact Matthew Giggey if the CFP brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Joseph M. Iafelice is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 6799248.

Curran Financial Partners, LLC
115 River Landing Drive, Suite 200
Daniel Island, SC 29492
(843) 300-1182
joe@curranfinancialpartners.com



Item 2: Educational Background and Business Experience

Joseph M. Iafelice

Born: 1995

Educational Background

- 2017 – Otterbein University, Bachelor of Science, Business Administration

Business Experience

- 04/2023 – Present, Curran Financial Partners, LLC, Investment Adviser Representative
- 06/2022 – 04/2023, Saw Service & Supply, Inc., Sales
- 12/2020 – 06/2022, Prince & Izant Company, Sales
- 02/2019 – 12/2020, Heidelberg Distributing, Sales
- 12/2017 – 01/2019, Northwestern Mutual Investment Services LLC, Financial Representative

Item 3: Disciplinary Information

No management person at Curran Financial Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Joseph M. Iafelice is licensed to sell life and health insurance and may engage in product sales with our clients, for which CFP will receive additional compensation. This does create an incentive to recommend these products based on compensation and not client need, however careful review is done to ensure that recommendations are made in the best interests of the client. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under CFP.

Item 5: Additional Compensation

Joseph M. Iafelice does not receive any economic benefit from any person, company, or organization, other than Curran Financial Partners, LLC in exchange for providing clients advisory services through Curran Financial Partners, LLC.

Item 6: Supervision

Adam Curran, as Chief Executive Officer of CFP, is responsible for supervision. He may be contacted at adam@curranfinancialpartners.com.



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Financial Partners

115 River Landing Drive, Suite 200
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Form ADV Part 2B – Brochure Supplement

For

Katherine Livingston

Investment Adviser Representative

This brochure supplement provides information about Katherine Livingston that supplements the Curran Financial Partners, LLC (“CFP”) brochure. A copy of that brochure precedes this supplement. Please contact Matthew Giggey if the CFP brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Katherine Livingston is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 3104999.

Curran Financial Partners, LLC
115 River Landing Drive,
Suite 200
Daniel Island, SC 29492
(843) 300-1182

Katherine@curranfinancialpartners.com



Item 2: Educational Background and Business Experience

Katherine Livingston

Born: 2001

Educational Background

- University of Georgia, Bachelor of Science, Finance (2022)
- Georgia Military College, Associate of Science in General Studies (2019)

Business Experience

- 03/2023 – Present, Curran Financial Partners, LLC, Client Services Representative

Item 3: Disciplinary Information

No management person at Curran Financial Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Katherine Livingston is licensed to sell life and health insurance and may engage in product sales with our clients, for which CFP will receive additional compensation. This does create an incentive to recommend these products based on compensation and not client need, however careful review is done to ensure that recommendations are made in the best interests of the client. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under CFP

Item 5: Additional Compensation

Katherine Livingston does not receive any economic benefit from any person, company, or organization, other than Curran Financial Partners, LLC in exchange for providing clients advisory services through Curran Financial Partners, LLC.

Item 6: Supervision

Matthew Giggey, as Chief Compliance Officer of CFP, is responsible for supervision. He may be contacted at mgiggey@curranfinancialpartners.com.





CURRAN

Financial Partners

115 River Landing Drive, Suite 200

Daniel Island, SC 29492

(843) 300-1182

Form ADV Part 2B – Brochure Supplement

For

Michael R. Baer

Investment Adviser Representative

This brochure supplement provides information about Michael R. Baer that supplements the Curran Financial Partners, LLC (“CFP”) brochure. A copy of that brochure precedes this supplement. Please contact Matthew Giggey if the CFP brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Michael R. Baer is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 6674368.

Curran Financial Partners, LLC
115 River Landing Drive, Suite 200
Daniel Island, SC 29492

(843) 300-1182
michael@curranfinancialpartners.com

September 5, 2023



Item 2: Educational Background and Business Experience

Michael R. Baer

Born: 1989

Educational Background

- 2008- 2009 – Montgomery County Community College, Blue Bell, Pennsylvania
- 2007- 2008 – Drexel University, Philadelphia, Pennsylvania

Business Experience

- 01/2018 – Present, Curran Financial Partners, LLC, Investment Adviser Representative
- 09/2017 – 01/2018, Prudential Advisors, Financial Professional
- 04/2016 – 09/2017, Western & Southern Life, Financial Representative
- 07/2013 – 04/2016, TD Bank, North America, Customer Service Representative

Item 3: Disciplinary Information

No management person at Curran Financial Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Michael R. Baer is licensed to sell life and health insurance and may engage in product sales with our clients, for which CFP will receive additional compensation. This does create an incentive to recommend these products based on compensation and not client need, however careful review is done to ensure that recommendations are made in the best interests of the client. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under CFP.

Item 5: Additional Compensation

Michael R. Baer does not receive any economic benefit from any person, company, or organization, other than Curran Financial Partners, LLC in exchange for providing clients advisory services through Curran Financial Partners, LLC.

Item 6: Supervision

Adam Curran, as Chief Executive Officer of CFP, is responsible for supervision. He may be contacted at adam@curranfinancialpartners.com.



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Form ADV Part 2B – Brochure Supplement

For

Ross A. DeWaard

Investment Adviser Representative

This brochure supplement provides information about Ross A. DeWaard that supplements the Curran Financial Partners, LLC (“CFP”) brochure. A copy of that brochure precedes this supplement. Please contact Matthew Giggey if the CFP brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Ross A. DeWaard is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 7630787.

Curran Financial Partners, LLC
115 River Landing Drive, Suite 200
Daniel Island, SC 29492
(843) 300-1182
ross@curranfinancialpartners.com



Item 2: Educational Background and Business Experience

Ross A. DeWaard

Born: 1997

Educational Background

- 2020 – University of Maine, BBA Finance, BBA Marketing, BBA Management

Business Experience

- 02/2022 – Present, Curran Financial Partners, LLC, Investment Adviser Representative
- 02/2022 – Present, Curran Financial Partners, LLC, Client Service Representative

**Ross A. DeWaard has no business experience prior to 02/2022*

Item 3: Disciplinary Information

No management person at Curran Financial Partners, LLC has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Ross A. DeWaard is licensed to sell life and health insurance and may engage in product sales with our clients, for which CFP will receive additional compensation. This does create an incentive to recommend these products based on compensation and not client need, however careful review is done to ensure that recommendations are made in the best interests of the client. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under CFP.

Item 5: Additional Compensation

Ross A. DeWaard does not receive any economic benefit from any person, company, or organization, other than Curran Financial Partners, LLC in exchange for providing clients advisory services through Curran Financial Partners, LLC.

Item 6: Supervision

Adam Curran, as Chief Executive Officer of CFP, is responsible for supervision. He may be contacted at adam@curranfinancialpartners.com.