

*This brochure supplement provides information about Sally Jane Boyle that supplements the SJ Boyle Wealth Planning, LLC brochure. You should have received a copy of that brochure. Please contact Sally Jane Boyle if you did not receive SJ Boyle Wealth Planning, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Sally Jane Boyle is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **SJ Boyle Wealth Planning, LLC**

Form ADV Part 2B – Individual Disclosure Brochure

*for*

### **Sally Jane Boyle**

Personal CRD Number: 1026790

Investment Adviser Representative

SJ Boyle Wealth Planning, LLC  
20 Valley Road  
Hanover, NH 03755  
(603) 727-9097  
[sboyle@sjboylewealthplanning.com](mailto:sboyle@sjboylewealthplanning.com)

UPDATED: 3/7/2016

## Item 2: Educational Background and Business Experience

**Name:** Sally Jane Boyle      **Born:** 1954

### **Educational Background and Professional Designations:**

#### **Education:**

BSBA Business, West Virginia University - 1976

#### **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. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

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

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’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, administered in 10 hours over a two-day period, 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.

### **ChFC®- Chartered Financial Consultant®**

#### **ChFC® MINIMUM QUALIFICATIONS:**

- Bachelor’s degree or its equivalent, in any discipline, from an accredited university, this qualifies as one year of business experience
- Three years of full-time business experience is required; this three-year period must be within the five years preceding the date of the award (part-time qualifying business experience is also credited toward the three-year requirement with 2,000 hours representing the equivalent of one year full-time experience).
- Must fulfill the ChFC® seven course curriculum, as well as two additional elective courses
- Pass the exams for all required and elective courses
- Pass a background check and candidate fitness standards test. You must reveal any criminal history, pending litigation or ethical violations. The CFP board verifies all employment history, qualifications and disciplinary issues via FINRA's Central Registration Depository.

### **Business Background:**

06/2011 - Present	Principal SJ Boyle Wealth Planning LLC
06/2014 – 12/2014	Financial Advisor Ameriprise Financial
01/2011 - 01/2014	Financial Advisor Purshe Kaplan Sterling Investments
10/2007 - 12/2010	Financial Advisor Citigroup Global Markets Inc.

09/2007 - 12/2010

Financial Advisor  
Morgan Stanley Smith Barney

04/2005 - 10/2007

Financial Advisor  
Chittenden Bank

### **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

### **Item 4: Other Business Activities**

Sally Jane Boyle is not engaged in any investment-related business or occupation (other than this advisory firm).

### **Item 5: Additional Compensation**

Sally Jane Boyle does not receive any economic benefit from any person, company, or organization, other than SJ Boyle Wealth Planning, LLC in exchange for providing clients advisory services through SJ Boyle Wealth Planning, LLC.

### **Item 6: Supervision**

As the only owner and representative of SJ Boyle Wealth Planning, LLC, Sally Jane Boyle supervises all activities of the firm. Sally Jane Boyle's response information is on the cover page of this disclosure document. Sally Jane Boyle adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.

## Item 7: Requirements For State Registered Advisers

*This disclosure is required by New Hampshire state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

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