

**FORM ADV****Uniform Application for Investment Adviser Registration****Part II - Page 1****OMB APPROVAL**

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Name of Investment Adviser:

Coordinated Financial Planning

Address: (Number and Street)	(City)	(State)	(Zip Code)	Area Code	Telephone Number
4555 Lake Forest Drive, Suite 560	Cincinnati	Ohio	45242	513	769-3131

**This part of Form ADV gives information about the investment adviser and its business for the use of clients.  
The information has not been approved or verified by any governmental authority.**

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(Schedules A, B, C, D, and E are included with Part I of this Form, for the use of regulatory bodies, and are not distributed to clients.)

Potential Persons who are not to respond to the collection of information contained in this form are not  
required to respond unless the form displays a currently valid OMB control number.

**Form ADV**  
**Part II - Page 2**

Applicant:  
Coordinated Financial Planning

SEC File Number:  
801- 19769

Date:  
03/28/2007

**1. A. Advisory Services and Fees.** (check the applicable boxes)

For each type of service provided, state the approximate % of total advisory billings from that service. (See instruction below.)

**Applicant:**

- |   |       |
|---|-------|
| <input checked="" type="checkbox"/> (1) Provides investment supervisory services  | 50 %  |
| <input type="checkbox"/> (2) Manages investment advisory accounts not involving investment supervisory services   | ___ % |
| <input checked="" type="checkbox"/> (3) Furnishes investment advice through consultations not included in either service described above                                    | 15 %  |
| <input type="checkbox"/> (4) Issues periodicals about securities by subscription  | ___ % |
| <input checked="" type="checkbox"/> (5) Issues special reports about securities not included in any service described above   | 5 %   |
| <input type="checkbox"/> (6) Issues, not as part of any service described above, any charts, graphs, formulas, or other devices which client may use to evaluate securities | ___ % |
| <input checked="" type="checkbox"/> (7) On more than an occasional basis, furnishes advice to clients on matters not involving securities                                   | 30 %  |
| <input type="checkbox"/> (8) Provides a timing service  | ___ % |
| <input type="checkbox"/> (9) Furnishes advice about securities in any manner not described above  | ___ % |

(Percentages should be based on applicant's last fiscal year. If applicant has not completed its first fiscal year, provide estimates of advisory billings for that year and state that the percentages are estimates.)

Yes No

B. Does applicant call any of the services it checked above financial planning or some similar term?

☒ ☐

**C. Applicant offers investment advisory services for: (check all that apply)**

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> (1) A percentage of assets under management      | <input type="checkbox"/> (4) Subscription fees      |
| <input type="checkbox"/> (2) Hourly charges  | <input checked="" type="checkbox"/> (5) Commissions |
| <input checked="" type="checkbox"/> (3) Fixed fees (not including subscription fees) | <input type="checkbox"/> (6) Other                  |

**D. For each checked box in A above, describe on Schedule F:**

- the services provided, including the name of any publication or report issued by the adviser on a subscription basis or for a fee
- applicant's basic fee schedule, how fees are charged and whether its fees are negotiable
- when compensation is payable, and if compensation is payable before service is provided, how a client may get a refund or may terminate an investment advisory contract before its expiration date

**2. Types of Clients --** Applicant generally provides investment advice to: (check those that apply)

- |   |  |
|---|--|
| <input checked="" type="checkbox"/> A. Individuals                      | <input checked="" type="checkbox"/> E. Trusts, estates, or charitable organizations                    |
| <input type="checkbox"/> B. Banks or thrift institutions                | <input checked="" type="checkbox"/> F. Corporations or business entities other than those listed above |
| <input type="checkbox"/> C. Investment companies                        | <input type="checkbox"/> G. Other (describe on Schedule F)   |
| <input checked="" type="checkbox"/> D. Pension and profit sharing plans |  |

Answer all items. Complete amended pages in full, circle amended items and file with execution page (page 1).

**3. Types of Investments** Applicant offers advice on the following: (check those that apply)

- |   |  |
|---|--|
| <input type="checkbox"/> A. Equity securities   | <input checked="" type="checkbox"/> H. United States governmental securities |
| <input checked="" type="checkbox"/> (1) exchange-listed securities                                |  |
| <input checked="" type="checkbox"/> (2) securities traded over-the-counter                        | <input type="checkbox"/> I. Options contracts on:                            |
| <input type="checkbox"/> (3) foreign issuers  | <input type="checkbox"/> (1) securities                                      |
|   | <input type="checkbox"/> (2) commodities                                     |
| <input type="checkbox"/> B. Warrants  |  |
| <input checked="" type="checkbox"/> C. Corporate debt securities<br>(other than commercial paper) | <input type="checkbox"/> J. Futures contracts on:                            |
| <input checked="" type="checkbox"/> D. Commercial paper   | <input type="checkbox"/> (1) tangibles                                       |
| <input checked="" type="checkbox"/> E. Certificates of deposit                                    | <input type="checkbox"/> (2) intangibles                                     |
| <input checked="" type="checkbox"/> F. Municipal securities                                       |  |
| <input type="checkbox"/> G. Investment company securities:  | <input type="checkbox"/> K. Interests in partnerships investing in:          |
| <input checked="" type="checkbox"/> (1) variable life insurance                                   | <input checked="" type="checkbox"/> (1) real estate                          |
| <input checked="" type="checkbox"/> (2) variable annuities  | <input checked="" type="checkbox"/> (2) oil and gas interests                |
| <input checked="" type="checkbox"/> (3) mutual fund shares  | <input checked="" type="checkbox"/> (3) other (explain on Schedule F)        |
|   | <input type="checkbox"/> L. Other (explain on Schedule F)                    |

**4. Methods of Analysis, Sources of Information, and Investment Strategies.**

**A. Applicant's security analysis methods include: (check those that apply)**

- |   |  |
|---|--|
| (1) <input checked="" type="checkbox"/> Charting    | (4) <input type="checkbox"/> Cyclical                      |
| (2) <input checked="" type="checkbox"/> Fundamental | (5) <input type="checkbox"/> Other (explain on Schedule F) |
| (3) <input checked="" type="checkbox"/> Technical   |  |

**B. The main sources of information applicant uses include: (check those that apply)**

- |   |   |
|---|---|
| (1) <input checked="" type="checkbox"/> Financial newspapers and magazines    | (5) <input checked="" type="checkbox"/> Timing services   |
| (2) <input type="checkbox"/> Inspections of corporate activities              | (6) <input checked="" type="checkbox"/> Annual reports, prospectuses, filings with the Securities and Exchange Commission |
| (3) <input checked="" type="checkbox"/> Research materials prepared by others | (7) <input type="checkbox"/> Company press releases   |
| (4) <input checked="" type="checkbox"/> Corporate rating services             | (8) <input type="checkbox"/> Other (explain on Schedule F)  |

**C. The investment strategies used to implement any investment advice given to clients include: (check those that apply)**

- |   |  |
|---|--|
| (1) <input checked="" type="checkbox"/> Long term purchases (securities held at least a year) | (5) <input checked="" type="checkbox"/> Margin transactions  |
| (2) <input checked="" type="checkbox"/> Short term purchases (securities sold within a year)  | (6) <input type="checkbox"/> Option writing, including covered options, uncovered options, or spreading strategies |
| (3) <input type="checkbox"/> Trading (securities sold within 30 days)                         | (7) <input type="checkbox"/> Other (explain on Schedule F)   |
| (4) <input type="checkbox"/> Short sales  |  |

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03/23/1995

**5. Education and Business Standards.**

Yes No

Are there any general standards of education or business experience that applicant requires of those involved in determining or giving investment advice to clients?.....

☒ ☐

(If yes, describe these standards on Schedule F.)

**6. Education and Business Background.**

For:

- each member of the investment committee or group that determines general investment advice to be given to clients, or
- if the applicant has no investment committee or group, each individual who determines general investment advice given to clients (if more than five, respond only for their supervisors)
- each principal executive officer of applicant or each person with similar status or performing similar functions.

On Schedule F, give the:

- name
- year of birth
- formal education after high school
- business background for the preceding five years

**7. Other Business Activities.** (check those that apply)

- ☐ A. Applicant is actively engaged in a business other than giving investment advice.
- ☒ B. Applicant sells products or services other than investment advice to clients.
- ☐ C. The principal business of applicant or its principal executive officers involves something other than providing investment advice.

(For each checked box describe the other activities, including the time spent on them, on Schedule F.)

**8. Other Financial Industry Activities or Affiliations.** (check those that apply)

- ☐ A. Applicant is registered (or has an application pending) as a securities broker-dealer.
- ☐ B. Applicant is registered (or has an application pending) as a futures commission merchant, commodity pool operator or commodity trading adviser.
- C. Applicant has arrangements that are material to its advisory business or its clients with a related person who is a:
- |  |  |
|--|--|
| <input checked="" type="checkbox"/> (1) broker-dealer  | <input type="checkbox"/> (7) accounting firm                                       |
| <input type="checkbox"/> (2) investment company  | <input type="checkbox"/> (8) law firm  |
| <input type="checkbox"/> (3) other investment adviser  | <input checked="" type="checkbox"/> (9) insurance company or agency                |
| <input type="checkbox"/> (4) financial planning firm   | <input type="checkbox"/> (10) pension consultant                                   |
| <input type="checkbox"/> (5) commodity pool operator, commodity trading adviser or futures commission merchant | <input type="checkbox"/> (11) real estate broker or dealer                         |
| <input type="checkbox"/> (6) banking or thrift institution   | <input type="checkbox"/> (12) entity that creates or packages limited partnerships |

(For each checked box in C, on Schedule F identify the related person and describe the relationship and the arrangements.)

Yes No

- D. Is applicant or a related person a general partner in any partnership in which clients are solicited to invest?...

☐ ☒

(If yes, describe on Schedule F the partnerships and what they invest in.)

Answer all items. Complete amended pages in full, circle amended items and file with execution page (page 1).

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06/01/1998

**9. Participation of Interest in Client Transactions.**

Applicant or a related person: (check those that apply)

- ☐ A. As principal, buys securities for itself from or sells securities it owns to any client.
- ☒ B. As broker or agent effects securities transactions for compensation for any client.
- ☐ C. As broker or agent for any person other than a client effects transactions in which client securities are sold to or bought from a brokerage customer.
- ☐ D. Recommends to clients that they buy or sell securities or investment products in which the applicant or a related person has some financial interest.
- ☒ E. Buys or sells for itself securities that it also recommends to clients.

(For each box checked, describe on Schedule F when the applicant or a related person engages in these transactions and what restrictions, internal procedures, or disclosures are used for conflicts of interest in those transactions.)

Describe, on Schedule F, your code of ethics, and state that you will provide a copy of your code of ethics to any client or prospective client upon request.

- 10. Conditions for Managing Accounts.** Does the applicant provide investment supervisory services, manage investment advisory accounts or hold itself out as providing financial planning or some similarly termed services *and* impose a minimum dollar value of assets or other conditions for starting or maintaining an account? Yes No
- ☒ ☐

(If yes, describe on Schedule F.)

- 11. Review of Accounts.** If applicant provides investment supervisory services, manages investment advisory accounts, or holds itself out as providing financial planning or some similarly termed services:

A. Describe below the reviews and reviewers of the accounts. **For reviews**, include their frequency, different levels, and triggers factors. **For reviewers**, include the number of reviewers, their titles and functions, instructions they receive from applicant on performing reviews, and number of accounts assigned each.

Each portfolio is continuously monitored and reviewed on a quarterly basis by the officers of the company. Each client's financial plan is updated once a year. The financial plan is reviewed more frequently if market conditions change substantially.

B. Describe below the nature and frequency of regular reports to clients on their accounts.

Quarterly - Portfolio position reports.

Annually - Complete financial plan reviewed or updated.

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**12. Investment or Brokerage Discretion.**

A. Does applicant or any related person have authority to determine, without obtaining specific client consent, the:

- |  | Yes                                 | No                       |
|--|-------------------------------------|--------------------------|
| (1) securities to be bought or sold? .....               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| (2) amount of the securities to be bought or sold? ..... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| (3) broker or dealer to be used? .....                   | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| (4) commission rates paid? .....                         | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

- |   | Yes                                 | No                       |
|---|-------------------------------------|--------------------------|
| B. Does applicant or a related person suggest brokers to clients? ..... | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

For each yes answer to A describe on Schedule F any limitations on the authority. For each yes to A(3), A(4) or B, describe on Schedule F the factors considered in selecting brokers and determining the reasonableness of their commissions. If the value of products, research and services given to the applicant or a related person is a factor, describe:

- the products, research and services
- whether clients may pay commission higher than those obtainable from other brokers in return for those products and services
- whether research is used to service all of applicant's accounts or just those accounts paying for it; and
- any procedures the applicant used during the last fiscal year to direct client transactions to a particular broker in return for products and research services received.

**13. Additional Compensation.**

Does the applicant or a related person have any arrangements, oral or in writing, where it:

- |   |                                     |                                     |
|---|-------------------------------------|-------------------------------------|
| A. is paid cash by or receives some economic benefit (including commissions, equipment or non-research services) from a non-client in connection with giving advice to clients? ..... | Yes                                 | No                                  |
|   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| B. directly or indirectly compensates any person for client referrals? .....  | Yes                                 | No                                  |
|   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |

(For each yes, describe the arrangements on Schedule F.)

**14. Balance Sheet.** Applicant must provide a balance sheet for the most recent fiscal year on Schedule G if applicant:

- has custody of client funds or securities (unless applicant is registered or registering only with the Securities and Exchange Commission); or
  - requires prepayment of more than \$500 in fees per client and 6 or more months in advance
- |  |                          |                                     |
|--|--------------------------|-------------------------------------|
| Has applicant provided a Schedule G balance sheet? ..... | Yes                      | No                                  |
|  | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

**Answer all items. Complete amended pages in full, circle amended items and file with execution page (page 1).**

**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant:	SEC File Number:	Date:
Coordinated Financial Planning Corp.	801-19769	03/31/2005

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: <b>Coordinated Financial Planning Corp.</b>		IRS Empl. Ident. No.: <b>31-1069735</b>
Item of Form (identify)	Answer	
1. A., D.	<p>If contracted, we can provide a complete array of financial planning services. These services can range from simple product recommendations through very comprehensive written financial plans and financial management advisory services as outlined in Item 2. C.</p> <p>After a detailed fact-finding interview with the client, we may construct a number of reports including the following:</p> <ol style="list-style-type: none"> <li>1) Personal Financial Statements and Detailed Analysis</li> <li>2) Tax &amp; Cash Flow Statements</li> <li>3) Education Planning</li> <li>4) Financial Independence Studies</li> <li>5) Estate Planning Studies and Detailed Analysis</li> <li>6) Asset Allocation Modeling</li> <li>7) Portfolio Positions – provided on a quarterly basis</li> <li>8) Charitable Trust Design and Analysis</li> </ol> <p>After a review of the client's position and goals, we make specific recommendations of appropriate investments, insurance, tax planning, cash flow and estate planning techniques to achieve the stated objectives.</p> <p>Engagements are handled in one of the three following ways:</p>	
1. C.	<p>1) Comprehensive Financial Plan – for those clients who do require a formal written financial plan, we charge a fee of \$795, one half of which is paid at the beginning of the work and the balance is paid after the plan has been explained and delivered. If a client decides to implement the plan recommendations through us, we will be compensated as stated in paragraph 2 or 3 below.</p>	
1. C., D., 10	<p>2) Comprehensive Plan and Advisory Agreement – for clients whose financial situations require advanced planning strategies, asset management services, annual plan maintenance and review, we will work on a percentage of assets under management basis. This service provides the client with our most detailed financial plan and continuous asset management services. The fee charged in the first year will be between .5% and 4% (average case is 1.5%) of adjusted net worth.* The first year fee will be determined and written into the contract based on our assessment of the time and effort involved in the actual implementation of the plan. This arrangement will often necessitate the establishment of a discount brokerage account to transact the purchase and sale of certain no-load and institutional mutual funds and other securities. The discount broker may charge transaction fees which will be charged to the client's brokerage account. We will assist in account transfers, asset retitling for the estate planning, and integration with clients' attorney and/or accountant. In essence, we will oversee the complete implementation of the financial plan. Our annual fee** is 1% of assets under</p> <p>* Adjusted Net Worth is defined to mean total net worth minus the value of the client's personal residence(s), tangible personal property, vehicles and jewelry.</p> <p>** Annual Fees: 0-\$1,000,000 = 1% Next \$1,000,000 = .75% Over \$2,000,000 = Negotiable</p>	

Complete amended pages in full, circle amended items and file with execution page (page 1).

**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant:	SEC File Number:	Date:
Coordinated Financial Planning Corp.	801-19769	03/31/2005

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: <b>Coordinated Financial Planning Corp.</b>		IRS Empl. Ident. No.: <b>31-1069735</b>
Item of Form (identify)	Answer	
1. C., D., 10 (continued)	<p>management after the first year if done on a discretionary basis. An additional .5% will be charged if the client has to be notified and approve of each transaction. Occasionally we recommend financial products not available through the broker/custodial account. These might include variable annuities, variable universal life contracts, and public/private limited partnerships, which carry with them sales commissions.*** We hold licenses that would allow us to receive commissions from these products, which we will credit to the client's fee account as a direct offset to the fees we charge. This gives our clients the flexibility for us as an advisor to be able to search across the entire marketplace for the very best products for the client's needs. Any such credits will be included on the client's quarterly billing. The minimum annual fee under this agreement will be \$5,000.</p> <p>The term of our agreement shall be for a period of twelve (12) months from the date of signing the agreement and shall be automatically renewed for successive periods of one (1) year at a time unless either party notifies the other at least thirty (30) days prior to the expiration of the original or any other term of its intention to terminate the agreement at the expiration of such term. However, the agreement may be terminated at any time by either party with a thirty (30) day written notice to the other party of the agreement. If terminated by the client at any time, the client will be responsible to pay the company the fee for the quarter in which such cancellation occurred plus the fee for one additional quarter. If the company terminates the agreement, the fee will be prorated to the date of termination. Upon termination of the agreement for any reason whatsoever, any balance then existing in the client's credit offset account shall inure to the benefit of the company in its entirety.</p>	
1. C.	<p>Clients and prospective clients are advised when mutual funds are used in their portfolio that each fund will have its own internal fund manager advisory fee. We will provide all relevant information about each recommended fund, including fund expenses, during the financial planning process.</p>	
	<p>3) Product Recommendation Only – for those clients requiring very limited financial planning services (typically members of a client's family) and who may or may not require a financial plan, we will recommend appropriate financial products on a fee per product or commission only basis with any such fee or commission disclosed to them in advance. No client contract is utilized.</p>	
3. K.	<p>Occasionally we offer advice on partnerships investing in cable TV and agriculture.</p>	
5.	<p>We require that an associated person have a minimum of an Associates Degree, be a Certified Financial Planner or equivalent, or enroll in the appropriate courses within one year and have a minimum of two years of experience.</p>	
	<p>*** For fee billing purposes, hard to value assets such as limited partnerships, etc., will be carried at cost, as actual values are difficult to ascertain.</p>	

Complete amended pages in full, circle amended items and file with execution page (page 1).



**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant:	SEC File Number:	Date:
Coordinated Financial Planning Corp.	801-19769	03/29/2006

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: <b>Coordinated Financial Planning Corp.</b>		IRS Empl. Ident. No.: <b>31-1069735</b>
Item of Form (identify)	Answer	
7. B.	<p>Implementation of a financial plan requires about 50% of the time spent doing a total financial plan because of the time needed to fully educate a client on a recommended product. The time breakdown is as follows:</p> <p style="margin-left: 40px;">50% Financial Plan &amp; Strategies 25% Insurance Product 25% Securities Product</p> <p>When a financial product is recommended to a client and that an officer of our company can effect and be compensated for outside of discount brokerage accounts, the following procedure is used:</p> <ol style="list-style-type: none"> <li>1) Estimated compensation to be received and credited to client's fee offset account.</li> <li>2) A client is given current prospectus disclosing various risks, sales or redemption charges and management fees.</li> <li>3) All of these items are fully explained and client is educated in all areas of the financial product.</li> <li>4) Charts and graphs prepared by independent companies are also used for comparison.</li> <li>5) Conflicts of interest are disclosed in discussion and in the client contract.</li> </ol>	
9. E.	<p>Coordinated Financial Planning Corp.'s portfolio, Employee Profit Sharing Plan, as well as a significant portion of Stephen H. Perrin's personal investments are invested in portfolio models being recommended to clients. Transactions are done at the same time as client transactions are effected. These account records are maintained at the office. We feel that doing the same thing for ourselves with significant amounts of company and personal assets as we do for our clients eliminates potential conflicts of interest.</p>	
12. A., B.	<p>We really do not establish limits on any particular security to be bought or sold or the amount of securities to be bought or sold; however, we do buy and sell securities and determine the amounts through the development of the financial plan, which the client ultimately agrees or disagrees with. As time goes by, adjustments are made as a result of changes in the economies/markets to which the client is kept fully apprised.</p>	
12. A. (3 & 4), B.	<p>We do suggest broker/dealers to a client that are selected based on low transaction cost and high quality administrative services to us and the client. The broker/dealer's research on choosing investments is not usually a factor in our selection since we have many outside sources we rely on.</p>	
13. A.	<p>As previously disclosed on this form, we can and sometimes do receive commissions on financial products implemented through us. We also receive 12b-1 distribution fees from certain mutual funds held by some clients from many years ago that are not on an advisory agreement.</p> <p>Coordinated Financial Planning Corp. may recommend that clients establish brokerage accounts with the Schwab Institutional division of Charles Schwab &amp; Co., Inc. (Schwab), a registered broker-dealer, member SIPC, to maintain custody of clients' assets and to effect trades for their accounts. Coordinated Financial Planning Corp. is independently owned and operated and not affiliated with Schwab. Schwab provides Coordinated Financial Planning Corp. with access to its institutional trading and custody services, which are typically not available to Schwab retail investors. These services generally are available to independent investment advisors on an unsolicited basis, at no charge to them so long as a total of at least \$10 million of the advisor's clients' assets is maintained in accounts at Schwab Institutional, is not otherwise contingent upon Coordinated Financial Planning Corp. committing to Schwab any specific amount of business (assets in custody or trading). Schwab's services include brokerage, custody, research, and access to mutual funds and other</p>	

Complete amended pages in full, circle amended items and file with execution page (page 1).

**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant:	SEC File Number:	Date:
Coordinated Financial Planning Corp.	801-19769	03/29/2006

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

I. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: <b>Coordinated Financial Planning Corp.</b>		IRS Empl. Ident. No.: <b>31-1069735</b>
Item of Form (identify)	Answer	
	<p>investments that are otherwise generally available only to institutional investors or would require a significantly higher minimum initial investment.</p> <p>For Coordinated Financial Planning Corp. client accounts maintained in its custody, Schwab generally does not charge separately for custody but is compensated by account holders through commissions or other transaction-related fees for securities trades that are executed through Schwab or that settle into Schwab accounts.</p> <p>Schwab also makes available to Coordinated Financial Planning Corp. other products and services that benefit Coordinated Financial Planning Corp. but may not benefit its clients' accounts. Some of these other products and services assist Coordinated Financial Planning Corp. in managing and administering clients' accounts. These include software and other technology that provide access to client account data (such as trade confirmations and account statements); facilitate trade execution (and allocation of aggregated trade orders for multiple client accounts); provide research, pricing information and other market data; facilitate payment of Coordinated Financial Planning Corp. fees from its clients' accounts; and assist with back-office functions, recordkeeping and client reporting. Many of these services generally may be used to service all or a substantial number of Coordinated Financial Planning Corp. accounts, including accounts not maintained at Schwab Institutional. Schwab Institutional also makes available to Coordinated Financial Planning Corp. other services intended to help Coordinated Financial Planning Corp. manage and further develop its business enterprise. These services may include consulting, publications and conferences on practice management, information technology, business succession, regulatory compliance, and marketing. In addition, Schwab may make available, arrange and/or pay for these types of services rendered to Coordinated Financial Planning Corp. by independent third parties. Schwab Institutional may discount or waive fees it would otherwise charge for some of these services or pay all or a part of the fees of a third-party providing these services to Coordinated Financial Planning Corp. While as a fiduciary, Coordinated Financial Planning Corp. endeavors to act in its clients' best interest, and Coordinated Financial Planning Corp.'s recommendation that clients maintain their assets in accounts at Schwab may be based in part on the benefit to Coordinated Financial Planning Corp. of the availability of some of the foregoing products and services and not solely on the nature, cost or quality of custody and brokerage services provided by Schwab, which may create a potential conflict of interest.</p> <p>Coordinated Financial Planning Corp., on occasion, use the services of TD Ameritrade for their institutional services in the same capacity listed above depending on which firm benefits the client's particular needs.</p>	

Complete amended pages in full, circle amended items and file with execution page (page 1).

**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant:	SEC File Number:	Date:
Coordinated Financial Planning Corp.	801-19769	03/09/2009

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1.	Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: <b>Coordinated Financial Planning Corp.</b>	IRS Empl. Ident. No.: <b>31-1069735</b>
Item of Form (identify)	Answer	
6., 8. C.	<p>Stephen H. Perrin, President -- DOB 2/8/48</p> <p>Beavercreek High School (OH) -- 1966 Graduate  Sinclair College (OH) -- Business Administration: 1966-1968  Research &amp; Review Institute -- Completed both parts: 1971  American College; Chartered Life Underwriter -- Completed 3 parts: 1976-1977  Dennis Blitz Investment Institute -- Completed July 1980  College for Financial Planning, Denver, CO - Certified Financial Planner: 1988-1989  Authorized and certified by International Board of Standards and Practices for Certified Financial Planners to use the Certified Financial Planner designation, November, 1989.</p> <p>Professional association and memberships include the Financial Planning Association.</p> <p>NASD Licensed/Registered: 1980  Licensed for Life and A&amp;H Insurance: 1969  Registered Principal, Series 24: 2000  NASD General Securities, Series 7: 2002</p> <p>1970-1980: Bankers Life &amp; Casualty, Regional Director,  1980-1983: Underwriters Advisory Services, Owner - Financial Services Firm  1983-Present: Coordinated Financial Planning Corp., President -- Registered Investment Advisor</p> <p>Holds Registered Representative Agreement with Lincoln Securities Corp.</p> <p>Holds General Agent Agreements and Brokerage Agreements with various insurance companies.</p>	

Complete amended pages in full, circle amended items and file with execution page (page 1).

**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant:	SEC File Number:	Date:
Coordinated Financial Planning Corp.	801-19769	03/28/2007

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: <b>Coordinated Financial Planning Corp.</b>	IRS Empl. Ident. No.: <b>31-1069735</b>
Item of Form (identify)	Answer
6.	<p>Stephen H. Perrin, Jr. – DOB 6/16/69</p> <p>Lakota High School (OH) – 1987 Graduate  University of Cincinnati (OH) – A.A. Pre-Business Administration: 1992  Northern Kentucky University (KY) – B.S. Finance: 1995  College for Financial Planning, Denver, CO – Certified Financial Planner: 1998  Authorized and certified by International Board of Standards and Practices for Certified Financial Planners to use the Certified Financial Planner designation.</p> <p>Professional association and memberships include the Financial Planning Association.</p> <p>NASD General Securities, Series 7: 2005  Licensed for Life and A&amp;H Insurance: 2006</p> <p>1991-Present: Coordinated Financial Planning Corp., Financial Planner</p>

Complete amended pages in full, circle amended items and file with execution page (page 1).

**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant:	SEC File Number:	Date:
Coordinated Financial Planning Corp.	801-19769	03/31/2005

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: <b>Coordinated Financial Planning Corp.</b>		IRS Empl. Ident. No.: <b>31-1069735</b>
Item of Form (identify)	Answer	
6.	<p>Matthew B. Beamer – DOB 7/30/71</p> <p>Glen Este High School (OH) – 1989 Graduate  Thomas More College (KY) – B.A. Accounting: 1993  A.A. Business Administration: 1993  College for Financial Planning, Denver, CO – Certified Financial Planner: 2001  Authorized and certified by International Board of Standards and Practices for Certified Financial Planners to use the Certified Financial Planner designation.</p> <p>Professional association and memberships include the Financial Planning Association.</p> <p>1994-1995: Michael J. Wilhelm &amp; Associates, Staff Accountant  1995-1996: Schwartz Diversified, Plan Administrator  1996-Present: Coordinated Financial Planning Corp., Investment Administrator</p>	

Complete amended pages in full, circle amended items and file with execution page (page 1).

**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant:	SEC File Number:	Date:
Coordinated Financial Planning Corp.	801-19769	03/09/2009

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: <b>Coordinated Financial Planning Corp.</b>		IRS Empl. Ident. No.: <b>31-1069735</b>
Item of Form (identify)	Answer	
6.	<p>Bethann Benz – DOB 8/26/68</p> <p>Madison High School (OH) – 1986 Graduate            ICM School of Business (OH) – Associates in Accounting: 1987            College for Financial Planning, Denver, CO – 5 of 5 parts completed</p> <p>1988-1990: Clarion Hotel, Sales Manager            1990-1993: Application Data Systems, Inc., Administrative Assistant            1993-1995: Blue Ash Hotel, Sales &amp; Catering Manager            1995-1999: Jefferson Pilot Financial, Marketing Coordinator            1999-Present: Coordinated Financial Planning Corp., Office Manager</p>	

Complete amended pages in full, circle amended items and file with execution page (page 1).

**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant:	SEC File Number:	Date:
Coordinated Financial Planning Corp.	801-19769	06/01/2005

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: <b>Coordinated Financial Planning Corp.</b>		IRS Empl. Ident. No.: <b>31-1069735</b>
Item of Form (identify)	Answer	
6.	<p>Scott A. Pelfrey – DOB 2/9/64</p> <p>Miamisburg High School (OH) – 1982 Graduate  Sinclair Community College (OH) – A.A.S. Accounting: 1985  University of Cincinnati (OH) – B.S. Accounting &amp; Finance: 1987  College for Financial Planning, Denver, CO – Certified Financial Planner: 1992  Authorized and certified by International Board of Standards and Practices for Certified Financial Planners to use the Certified Financial Planner designation.</p> <p>Certified Public Accountant, 1991</p> <p>Professional association and memberships include the Financial Planning Association and American Institute of Certified Public Accountants.</p> <p>1987-1988: Umble &amp; Gayheart, CPA, Staff Accountant  1988-1989: Lewis Financial Management, Financial Paraplanner  1989-1996: Coordinated Financial Planning Corp., Financial Planner  1996-1998: Arthur Andersen, Tax Manager  1998-1999: Deloitte &amp; Touche, Tax Manager  1999-2004: Burke &amp; Schindler, Tax Manager  2004-2005: Arnett &amp; Fuster, Tax Supervisor  2005-Present: Coordinated Financial Planning Corp., Financial Planner</p>	

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**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant:	SEC File Number:	Date:
Coordinated Financial Planning Corp.	801-19769	03/09/2009

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: <b>Coordinated Financial Planning Corp.</b>		IRS Empl. Ident. No.: <b>31-1069735</b>
Item of Form (identify)	Answer	
6.	<p>Benson Ray Wright - DOB 12/17/1972</p> <p>St. Xavier High School (OH) – 1991 Graduate  Xavier University (OH) – BA Spanish: 1994  Universidad del Pais Vasco – Master Universitario: 1996  New York University – Masters Hispanic Literature: 1997, abd. MA 2001  University of Cincinnati – MBA, MS-IS: 2007</p> <p>1992-1993: Vice President Xavier Student Government  1992-1993: WVXU, Board Operator  1994-1995: Bar BeBop, Bar tender  1997-1998: Jeff Ruby's Waterfront Restaurant, Wait Staff  1998-2000: Radio and TV production, freelance production assistance and client service for motion picture and video production. Audio production services, Colonial House Media, LLC  2000-2002: Adjunct Spanish Language Instructor, University of Cincinnati, Northern Kentucky University, Xavier University  2002-2004: University of Dayton, Spanish Lecturer and Director of the University Language Learning Center  2005-2007: Nielsen BASES, Microsoft SharePoint Developer, Knowledge Management Department  2007-present: Small business IT consulting and business analysis  2008-present: CFP, Corp IT Manager and client service</p>	

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**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant:	SEC File Number:	Date:
Coordinated Financial Planning Corp.	801-19769	06/01/2005

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: <b>Coordinated Financial Planning Corp.</b>	IRS Empl. Ident. No.: <b>31-1069735</b>
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Item of Form (identify)	Answer
	<p><b>STATEMENT OF GENERAL POLICY</b></p> <p>This Code of Ethics ("Code") has been adopted by Coordinated Financial Planning Corporation and is designed to comply with Rule 20A-1 under the Investment Advisers Act of 1940 ("Advisers Act").</p> <p>This Code establishes rules of conduct for all employees of Coordinated Financial Planning Corporation and is designed to, among other things, govern personal securities trading activities in the accounts of employees. The Code is based upon the principle that Coordinated Financial Planning Corporation and its employees owe a fiduciary duty to Coordinated Financial Planning Corporation's client's to conduct their affairs, including their personal securities transactions, in such a manner as to avoid (i) serving their own personal interests ahead of clients, (ii) taking inappropriate advantage of their position with the firm and (iii) any actual or potential conflicts of interest or any abuse of their position of trust and responsibility.</p> <p>The Code is designed to ensure that the high ethical standards long maintained by Coordinated Financial Planning Corporation continue to be applied. The purpose of the Code is to preclude activities that may lead to or give the appearance of conflicts of interest, insider trading and other forms of prohibited or unethical business conduct. The excellent name and reputation of our firm continues to be a direct reflection of the conduct of each employee.</p> <p>Pursuant to Section 206 of the Advisers Act, both Coordinated Financial Planning Corporation and its employees are prohibited from engaging in fraudulent, deceptive or manipulative conduct. Compliance with this section involves more than acting with honesty and good faith alone. It means that the Coordinated Financial Planning Corporation has an affirmative duty of utmost good faith to act solely in the best interest of its clients.</p> <p>Coordinated Financial Planning Corporation and its employees are subject to the following specific fiduciary obligations when dealing with clients:</p> <ul style="list-style-type: none"> <li>• The duty to have a reasonable, independent basis for the investment advice provided;</li> <li>• The duty to obtain best execution for a client's transactions where the Firm is in a position to direct brokerage transactions for the client;</li> <li>• The duty to ensure that investment advice is suitable to meeting the client's individual objectives, needs and circumstances; and</li> <li>• A duty to be loyal to clients.</li> </ul> <p>In meeting its fiduciary responsibilities to its clients, Coordinated Financial Planning Corporation expects every employee to demonstrate the highest standards of ethical conduct for continued employment with Coordinated Financial Planning Corporation. Strict compliance with the provisions of the Code shall be considered a basic condition of employment with Coordinated Financial Planning Corporation. Coordinated Financial Planning Corporation's reputation for fair and honest dealing with its clients has taken considerable time to build. This standing could be seriously damaged as the result of even a single securities transaction being considered questionable in light of the fiduciary duty owed to our clients. Employees are urged to seek the advice of Matthew Beamer, the Chief Compliance Officer, for any questions about the Code or the application of the Code to their individual circumstances. Employees should also understand that a material breach of the provisions of the Code may constitute grounds for disciplinary action, including termination of employment with Coordinated Financial Planning Corporation.</p>

Complete amended pages in full, circle amended items and file with execution page (page 1).

**Schedule F of  
Form ADV  
Continuation Sheet for Form ADV Part II**

Applicant:	SEC File Number:	Date:
Coordinated Financial Planning Corp.	801-19769	06/01/2005

(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: <b>Coordinated Financial Planning Corp.</b>	IRS Empl. Ident. No.: <b>31-1069735</b>
Item of Form (identify)	Answer
	<p>The provisions of the Code are not all-inclusive. Rather, they are intended as a guide for employees of Coordinated Financial Planning Corporation in their conduct. In those situations where an employee may be uncertain as to the intent or purpose of the Code, he/she is advised to consult with Matthew Beamer. Matthew Beamer may grant exceptions to certain provisions contained in the Code only in those situations when it is clear beyond dispute that the interests of our clients will not be adversely affected or compromised. All questions arising in connection with personal securities trading should be resolved in favor of the client even at the expense of the interests of employees.</p> <p>Matthew Beamer will periodically report to senior management/board of directors of Coordinated Financial Planning Corporation to document compliance with this Code.</p> <p>A copy of this Code will be provided upon client request.</p>

Complete amended pages in full, circle amended items and file with execution page (page 1).