



FORM ADV PART 2B*

Brochure Supplement:

Professional Backgrounds of
Joyce L. Franklin, CPA, CFP
and
Tarren Schaar

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*This brochure supplement provides information about the qualifications of JLFranklin Wealth Planning's financial planning and investment advisory personnel. This is a supplement to the JLFranklin Wealth Planning brochure which you should have received previously. Please contact the Firm's Chief Compliance Officer, Joyce L. Franklin if you have not received the brochure or if you have any questions about the contents of this supplement. Additional information about the Firm is available at www.adviserinfo.sec.gov.

Each member of JLFranklin Wealth Planning's professional staff is evaluated on the basis of his or her education and work experience. As general standards, an undergraduate degree and prior related business experience are required. Graduate work and/or specialized business or technical skills are preferred.

All Firm personnel are supervised by the Firm's principals and the Chief Compliance Officer. Supervision is ongoing and includes account reviews, trade supervision, annual compliance reviews including the forensic testing of Firm systems, staff meetings and employee reviews.

JOYCE L. FRANKLIN, CPA, CFP®

Born: 1965

Education:

Virginia Polytechnic Institute, 1983-1985

University of Virginia, B.S. Finance, 1985-1987

San Francisco State University, M.S. Taxation, 1991-1994

University of California, Berkeley, Certificate in Personal Financial Planning, 1996-1999

Certified Public Accountant, CPA* designation conferred, 1997

Certified Financial Planner, CFP** designation conferred, 1999

Business Background:

JLFranklin Wealth Planning, Principal, 1998-Present

Kochis Fitz, Financial Planner Intern, 1998-1999

Ernst & Young LLP, Senior Tax Consultant, 1997-1998

Deloitte & Touche LLP, Senior Tax Consultant, 1994-1997

Disciplinary History:

Joyce has no professional disciplinary disclosures.

Professional and Community Activities:

Joyce provides the leadership and direction for JLFranklin Wealth Planning. She has nearly 20 years of experience in the personal financial and investment planning profession in addition to her 25 years of accounting experience. An alumna of Deloitte and Ernst & Young, she currently advises high net-worth individuals, corporate employees, and small business owners on tax and financial planning issues.

She is a founding member of Financial Planning Professionals and a member and/or former board member of the following organizations: Marin Community Foundation Professional Advisors Committee, Financial Planning Association (FPA) of San Francisco, National Association of Personal Financial Advisors (NAPFA), American Institute of Certified Public Accountants (AICPA), State Committee on Personal Financial Planning, and the California Society of Certified Public Accountants.

TARREN SCHAAR, Associate Financial Planner

Born: 1975

Education:

University of California, Santa Barbara, B.S. Biological Sciences and B.A. Environmental Studies, 1995-1999

University of California, Berkeley, Personal Financial Planning program, 2009-present

Business Background:

JLFranklin Wealth Planning, Associate Financial Planner, 2008-Present

City of Tracy, California, Associate Planner 2006-2007

City of Mill Valley, California, Associate Planner 2002-2006

Disciplinary History:

Tarren has no professional disciplinary disclosures.

Professional and Community Activities:

Tarren assists with both investment management and financial planning services for clients of JLFranklin Wealth Planning. As part of his financial planning responsibilities, Tarren creates and updates financial plans and analyzes client cash flow on an after-tax basis. His investment duties include assessing and rebalancing portfolios, implementing asset allocations, reviewing portfolios for tax planning opportunities, and assisting in quarterly performance reporting and reconciliation. In addition to his primary duties, Tarren also performs research for various firm projects.

For five years prior to joining the firm, Tarren worked as an associate city planner in the cities of Mill Valley and Tracy, California, where he managed a variety of private property development projects. He guided development proposals through the challenging entitlement process that frequently involved city council meetings and public hearings.

* A Certified Public Accountant ("CPA") is licensed and regulated by the applicable state board of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members¹ are required to follow a rigorous *Code of Professional Conduct* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

** The Certified Financial Planner ("CFP"®) designation requires the holder to meet education, examination, experience and ethics requirements, and pay an ongoing certification fee. A bachelor's degree (or higher), or its equivalent in any discipline, from an accredited college or university is required. Students are required to complete course training in nine core financial topic areas, sit for a 10 hour CFP Board Certification Examination, acquire three years full-time or equivalent (2,000 hours per year) part-time work experience in the financial planning field and undergo an extensive background check—including an ethics, character and criminal check.