

Form ADV Part 2A
Brochure Cover Page

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This brochure provides information about the qualifications and business practices of Parlan Financial Corporation. If you have any questions about the contents of this brochure, please contact Parlan Financial Corporation's Chief Compliance Officer Brian Hughes at 419-885-1130, or by email at bhughes@parlan.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission, or by any state securities authority.

Additional information about Parlan Financial Corporation is available on the SEC's website at www.adviserinfo.sec.gov

We are an investment adviser registered with the Securities and Exchange Commission. Our registration as an Investment Adviser does not imply any level of skill or training.

March 28, 2012

Material Changes

Material Changes since the Last Update

Under Types of Services the number of clients and assets has been updated to reflect current totals.

Full Brochure Available

Whenever you would like to receive a complete copy of the Parlan Financial Corporation Brochure, please contact us by telephone at 419-885-1130 or by email at bhughes@parlan.com.

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Advisory Business

Firm Description

Parlan Financial Corporation was founded in 1988 and provides personalized confidential financial planning and investment management services.

Parlan Financial Corporation is strictly a fee-only financial planning and investment management firm. The firm does not receive any commission income either directly or indirectly for its advice. The firm currently utilizes the six-step financial planning process. Advice is provided through consultation with the client and may include: determination of financial objectives, identification of financial problems, cash flow management, tax planning, insurance review, investment management, education funding, retirement planning, and estate planning.

We specialize in asset management that utilizes investment strategies that are considered more active than those used by traditional financial planning firms.

Parlan Financial Corporation does not act as a custodian of client assets. The client always maintains asset control. The firm places trades for clients under a limited power of attorney.

The initial meeting, which may be by telephone, is free of charge and is considered an exploratory interview to determine the extent to which financial planning and investment management services may be beneficial to the client.

Principal Owners

Helyn Bolanis is a 95% stockholder and Brian Hughes is a 5% stockholder.

Types of Advisory Services

Parlan Financial Corporation provides investment supervisory services, also known as asset management services, and manages investment advisory accounts not involving investment supervisory services.

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

As of December 31, 2011, Parlan Financial Corporation manages approximately \$35,150,000 in assets for approximately 83 clients. Approximately \$24,600,000 is managed on a discretionary basis, and \$10,550,000 is managed on a non-discretionary basis.

Tailored Relationships

Clients may impose restrictions on investing in certain securities or types of securities.

Types of Agreements

The following agreements define the typical client relationships.

Financial Planning Agreement

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

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

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

The fee for a financial plan is predicated upon the facts known at the start of the engagement. All fees are calculated based upon the hours required by the staff to complete the project and is not negotiable. Fees are quoted to prospective clients in the initial meeting, which is offered at no cost, or soon thereafter. Per our agreement, one-half is due upon signing the agreement, the balance when we deliver the plan, with a possibility of plus or minus 10%. Since financial planning is a discovery process, situations occur wherein the client is unaware of certain financial exposures or predicaments.

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

After delivery of a financial plan, future face-to-face meetings may be scheduled as necessary. Follow-up implementation work is billed separately at the rate of \$50 to \$150 per hour depending on the employee completing the work.

Hourly Planning Engagements

Parlan Financial Corporation provides hourly planning services for clients who need advice on a limited scope of work. The hourly rate for limited scope engagements is \$50 to \$150 depending on the employee completing the work.

Asset Management

Parlan Financial Corporation specializes in active asset management. Assets are invested primarily in no-load and exchange-traded funds, through brokers. Fund companies charge each fund shareholder fees that are disclosed in the fund prospectus. Brokerage firms may charge a transaction fee for the purchase of some funds.

Stocks and bonds may be purchased or sold through a brokerage account when appropriate. The brokerage firm charges a fee for stock and bond trades. Parlan Financial Corporation does not receive any compensation from brokerage firms.

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

Initial public offerings (IPOs) are not available through Parlan Financial Corporation.

Termination of Agreement

A Client may terminate any of the aforementioned agreements at any time by notifying Parlan Financial Corporation in writing and paying the rate for the time spent on the investment advisory engagement prior to notification of termination. If an advance payment is made, Parlan Financial Corporation will refund any unearned portion of that payment.

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

If you should have any complaints please contact Parlan Financial Corporation's Chief Compliance Officer Brian Hughes directly at bhughes@parlan.com.

Fees and Compensation

Description

Parlan Financial Corporation bases its fees on a percentage of assets under management and hourly charges.

Fee Billing

Investment management fees are usually deducted from a designated client account. The client must consent in advance to direct debiting of their investment account.

INVESTMENT MANAGEMENT FEES

The following fees are on an annualized basis. Clients are billed, in advance, on a quarterly basis at the beginning of each quarter or initial billing cycle. Each month end balance is averaged for the preceding three months. If significant withdrawals or contributions occur in the account during the preceding quarter, adjustments may be made to the way bills are calculated. There may be an additional fee billed upon receipt of additional monies during a quarter for a proportionate amount of the time remaining for management of those funds.

It is the client's responsibility to verify the accuracy of the adviser's fee calculation. The custodian does not determine whether or not the fee is properly calculated.

Managed Assets:	Rate:
\$ 0 - \$ 500,000	2.10%
\$ 500,001 - \$ 1,000,000	1.75%
\$ 1,000,001 - \$ 4,000,000	1.50%
\$ 4,000,001 - \$ 6,000,000	1.15%
\$ 6,000,001 - \$10,000,000	0.80%
\$10,000,001 and over	0.45%

The above fee schedule provides for continuous investment supervision of the portfolios, the written reports, and quarterly meetings. The firm has the right to waive or negotiate lower rates to the employees of the advisor and their families. Parlan Financial Corporation retains the option to exclude clients from management rate increases due to extenuating circumstances.

Parlan Financial Corporation clients pay two levels of advisory fees for the management of their assets, one directly to the firm and one indirectly to the managers of the mutual funds held in the portfolio. However, utilizing index funds provides for a lower fee structure relative to actively managed mutual funds.

There is a one-time hourly fee, referred to as the set-up fee, charged for the review of existing assets, the Asset Allocation Model, and the Selection of Investments. The hourly fee ranges from \$50 to \$150 per hour, depending on the level of service required. Parlan Financial Corporation holds the right to waive set-up fees. See financial planning fees below for full disclosures.

The advisor will aggregate the assets under management for family members. In the instance that there are multiple family accounts, the subsequent accounts will be added to the first account, thus benefiting from the reduced rates at higher account values.

FINANCIAL PLANNING FEES

All fees are calculated based upon the complexity of the case and the total hours to complete the project. Fees are quoted to prospective clients in the initial meeting, which is offered at no cost, or soon thereafter. Fees for financial plans are billed 50% in advance, with the balance due upon delivery of the financial plan, with a possibility of plus or minus 10%.

The actual billable hours are maintained and calculated internally by the staff. Should a problem or unforeseen complexity arise, the client is notified immediately to secure his/her wishes whether continuation of the research is acceptable.

Planning fees include rates at the following levels of service and skills, Para-Planner at \$50.00 per hour, Financial Analyst at \$75.00 per hour, Managers at \$85.00 per hour, Financial Planners at \$100.00 per hour, and Senior Financial Planners at \$150.00 per hour. Parlan Financial Corporation also offers a family discount for Planning Clients. The first family member who is a client pays full price. Consecutive family members receive a discounted fee based on all fees, planning and/or management, paid by the first family member. This can be negotiated if a family member would prefer to provide the discount to another family member. Annual fees up to:

\$ 0 - \$ 2,500 = 5% discount

\$ 2,500 - \$ 5,000 = 10% discount

\$ 5,000 - \$15,000 = 15% discount

\$15,000 + = 20% discount

From time to time the registrant may donate hours to 501(c)(3) organizations.

Other Fees

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

Parlan Financial Corporation, in its sole discretion, may waive its minimum fee and/or charge a lesser investment advisory fee based upon certain criteria (e.g., historical relationship, type of assets, anticipated future earning capacity, anticipated future additional assets, dollar amounts of assets to be managed, related accounts, account composition, etc.).

Expense Ratios

Mutual funds generally charge a management fee for their services as investment managers. The management fee can be included in the overall expense ratio. For example, an expense ratio of 0.50 means that the mutual fund company charges 0.5% for their services. These fees are in addition to the fees paid by you to Parlan Financial Corporation.

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

Past Due Accounts and Termination of Agreement

Parlan Financial Corporation reserves the right to terminate any financial planning engagement where a client has willfully concealed or has refused to provide pertinent information about financial situations deemed necessary and appropriate (in Parlan Financial Corporation's judgment) to provide proper financial advice. Any unused portion of fees collected in advance will be refunded within 30 days.

Performance-Based Fees

Sharing of Capital Gains

Parlan Financial Corporation does not charge performance based fees.

Types of Clients

Description

Parlan Financial Corporation generally provides investment advice to individuals, pension and profit sharing plans, trusts, estates, or charitable organizations, and corporations or business entities.

Client relationships vary in scope and length of service.

Account Minimums

The minimum account size is \$500,000 of assets under management, which equates to an annual fee of \$10,500. Parlan Financial Corporation has the discretion to waive the account minimum. Other exceptions will apply to employees of Parlan Financial Corporation and their relatives, or relatives of existing clients.

Methods of Analysis, Investment Strategies and Risk of Loss

Methods of Analysis

Security analysis methods may include charting, fundamental analysis, technical analysis, and cyclical analysis.

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

Other sources of information that Parlan Financial Corporation may use include Morningstar Principia mutual fund information and the World Wide Web.

Investment Strategies

Parlan Financial Corporation utilizes proprietary investment strategies and algorithms for asset management. The investment strategy for a specific client is based upon the objectives stated by the client during consultations. The client may change these objectives at any time. Other strategies may include long-term purchases, short-term purchases, trading, short sales, margin transactions, and option writing (including covered options, uncovered options or spreading strategies).

Risk of Loss

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

- **Interest-rate Risk:** Fluctuations in interest rates may cause investment prices to fluctuate. For example, when interest rates rise, yields on existing bonds become less attractive, causing their market values to decline.
- **Market Risk:** The price of a security, bond, or mutual fund may drop in reaction to tangible and intangible events and conditions. This type of risk is caused by external factors independent of a security's particular underlying circumstances. For example, political, economic and social conditions may trigger market events.
- **Inflation Risk:** When any type of inflation is present, a dollar today will not buy as much as a dollar next year, because purchasing power is eroding at the rate of inflation.
- **Currency Risk:** Overseas investments are subject to fluctuations in the value of the dollar against the currency of the investment's originating country. This is also referred to as exchange rate risk.

- **Reinvestment Risk:** This is the risk that future proceeds from investments may have to be reinvested at a potentially lower rate of return (i.e. interest rate). This primarily relates to fixed income securities.
- **Business Risk:** These risks are associated with a particular industry or a particular company within an industry. For example, oil-drilling companies depend on finding oil and then refining it, a lengthy process, before they can generate a profit. They carry a higher risk of profitability than an electric company, which generates its income from a steady stream of customers who buy electricity no matter what the economic environment is like.
- **Liquidity Risk:** Liquidity is the ability to readily convert an investment into cash. Generally, assets are more liquid if many traders are interested in a standardized product. For example, Treasury Bills are highly liquid, while real estate properties are not.
- **Financial Risk:** Excessive borrowing to finance a business' operations increases the risk of profitability, because the company must meet the terms of its obligations in good times and bad. During periods of financial stress, the inability to meet loan obligations may result in bankruptcy and/or a declining market value.

Disciplinary Information

Legal and Disciplinary

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

Other Financial Industry Activities and Affiliations

Affiliations

Parlan Financial Corporation has arrangements that are material to its advisory business or its clients with other investment advisors and financial planning firms. Parlan Financial Corporation occasionally will accept investment recommendations from an outside investment adviser during the ordinary course of business. This investment advice is not the sole basis for determining investment procedure and as such is incidental to our current practice. Parlan Financial Corporation will also occasionally consult and accept investment recommendations from an outside financial planning firm. This investment advice is not the sole basis for determining investment procedures and such are incidental to our current practices.

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

Code of Ethics

The employees of Parlan Financial Corporation have committed to a Code of Ethics that is available for review by clients and prospective clients upon request. The firm will provide a copy of the Code of Ethics to any client or prospective client upon request.

Participation or Interest in Client Transactions

Parlan Financial Corporation and its employees may buy or sell securities that are also held by clients. Employees may not trade their own securities ahead of client trades. Employees comply with the provisions of the Parlan Financial Corporation Employee Handbook.

Personal Trading

The Chief Compliance Officer of Parlan Financial Corporation is Brian Hughes. He reviews all employee trades each quarter. His trades are reviewed by Helyn Bolanis. The personal trading reviews ensure that the personal trading of employees does not affect the markets, and that clients of the firm receive preferential treatment. Since most employee trades are small mutual fund trades or exchange-traded fund trades, the trades do not affect the securities markets.

Brokerage Practices

Selecting Brokerage Firms

Parlan Financial Corporation recommends custodians based on the proven integrity and financial responsibility of the firm and the best execution of orders at reasonable commission rates.

The following steps are used in determining which custodians will be used for each of the client accounts.

- The registrant reviews the trading process, and determines which factors are important to the client's trading activity. These factors may include: Trade Support, Reliability, Integrity, Frequency of failed trades, Trade Error Resolution, Account Fees, Trading Costs, Short-Term Redemption Fees, Stock Commissions, Large Volume Stock Support, Restricted Stock Trading, and Inventory of Bonds.
- Analyze how the custodians being considered match-up in relation to the account needs.
- Determine which custodians will be used

- Annually review the process and results. Trading activity of each account is reviewed to ensure that they are at the custodian that most fits their needs.

Parlan Financial Corporation currently may recommend that clients establish brokerage accounts with Ceros Financial Service, the Schwab Institutional division of Charles Schwab & Company, Inc, and Trust Company of America. These firms offer Parlan Financial Corporation services, which include custody of Client securities, trade execution, clearance and settlement of transactions, and daily research and investment information. Parlan Financial Corporation is independently owned and operated and not affiliated with any of these firms.

Parlan Financial Corporation does not receive fees or commissions from any of these arrangements.

Best Execution

Parlan Financial Corporation reviews the execution of trades at each custodian each quarter. The review is documented in the Parlan Financial Corporation compliance file. Trading fees charged by the custodians are also reviewed on a quarterly basis. Parlan Financial Corporation does not receive any portion of the trading fees.

Soft Dollars

Charles Schwab & Company makes available to the advisor other products and services that benefit the advisor but may not benefit its clients' accounts. Some of these other products and services assist the advisor in managing and administering clients' accounts. These include software and other technology that provides 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; 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 the advisor's accounts, including accounts not maintained at Schwab Institutional.

Schwab Institutional also makes available to the advisor other services intended to help the advisor 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.

Helyn Bolanis is a member of the volunteer advisory board of Ceros Financial Services. This is a non paying position. Ceros Financial Services may pay for travel, lodging, meal, and entertainment expenses while attending the meetings. The advisory board is made up of advisors that utilize Ceros Financial Service. The purpose of the board is to help Ceros Financial Services better serve the advisors and the advisors' clients.

As part of its ongoing effort to provide service to its custodians, Ceros Financial Services is providing licensing of Hydra Trade to Parlan Financial Corporation. Hydra Trade is a product of Spartan Technologies, and is used for trade execution. Parlan is in no way obligated to deliver any revenue to CFS in exchange for the software licensing. Parlan is not expected to steer its clients to RFS nor is it expected to maintain a certain level of trading activity.

Order Aggregation

Most trades are mutual funds where trade aggregation does not garner any client benefit.

When an investment opportunity is identified, and the Chief Investment Officer (CIO) authorizes a purchase or sale, all accounts that are part of the identified strategy group will have the trade executed in the account according to the percent identified by the CIO. If we are unable to meet the demand for every account, the amount that is secured will be divided among all accounts in a manner that all accounts will have an equal percent in the security based on their Debt to Equity ratio. If a trade was only a partial fill, some accounts may need to be excluded due to a low share allocation leading to a high transaction rate. If this is the case the account will have zero shares allocated.

Any non-mutual fund equity trade that is executed for 2 or more clients at the same custodian will be placed, when possible, as a single trade within the Parlan Financial Corporation's Allocation account. When the trade is complete the transaction is divided into the predetermined accounts using the average execution price for all accounts.

Review of Accounts

Periodic Reviews

The reviews of the discretionary investment accounts are done on a daily basis by Helyn Bolanis, President and CEO, and Brian Hughes, Vice President. Changes are made based upon the current economic conditions, technical & fundamental analysis, proprietary investment strategy, the client's investment objectives, and the initial asset allocation model.

Each reviewer offers to meet with the clients either in person or on the phone each quarter. Some clients prefer an annual meeting rather than quarterly. The quarterly review process with the client entails ascertaining any changes to client circumstances and their asset allocation. Any instruction given to the reviewer at the meeting is documented as a Client Service Request (CSR). The employee best suited for the work order performs the work.

Financial Planning accounts are reviewed as frequently as the client would like. The client dictates the frequency of the review upon the completion of the financial plan.

Review Triggers

Other conditions that may trigger a review are changes in the tax laws, new investment information, and changes in a client's own situation.

Regular Reports

The Investment Committee is instructed to consider the client's current security positions and the likelihood that the performance of each security will contribute to the investment objectives of the client.

For Investment Management clients the following reports are given quarterly, and are subject to change as new reports become available through the service provider:

1. Portfolio Appraisal
2. Date-to-Date Gain or Loss
3. Income & Expense
4. Realized Gains and Losses
5. Purchase and Sale
6. Performance Report

Client Referrals and Other Compensation

Incoming Referrals

Parlan Financial Corporation has been fortunate to receive many client referrals over the years. The referrals came from current clients, estate planning attorneys, accountants, employees, personal friends of employees and other similar sources. Parlan Financial Corporation may supply a non-cash gift of less than \$100 to individuals who provide a client referral.

Referrals Out

Parlan Financial Corporation does not accept referral fees or any form of remuneration from other professionals when a prospect or client is referred to them.

Custody

SEC “Custody”

Parlan Financial Corporation does not have custody of clients' funds or securities in any manner. The firm does deduct fees directly from the client accounts. All client accounts will be held by a qualified custodian that is not related to Parlan Financial Corporation.

Account Statements

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

Performance Reports

Clients are urged to compare the account statements received directly from their custodians to the performance report statements provided by Parlan Financial Corporation.

Net Worth Statements

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

Investment Discretion

Discretionary Authority for Trading

Parlan Financial Corporation accepts discretionary authority to manage securities accounts on behalf of clients. Parlan Financial Corporation has the authority to determine, without obtaining specific client consent beforehand, the securities to be bought or sold, and the amount of the securities to be bought or sold.

Discretionary trading authority facilitates placing trades in your accounts on your behalf so that we may promptly implement the investment policy that you have approved in writing in your Investment Management Agreement.

Limited Power of Attorney

A limited power of attorney is a trading authorization for this purpose. You sign a limited power of attorney so that we may execute the trades that you have approved.

Voting Client Securities

Proxy Votes

Parlan Financial Corporation does not vote proxies on securities. Clients are expected to vote their own proxies.

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

Financial Information

Financial Condition

Parlan Financial Corporation does not have any financial impairment that will preclude the firm from meeting contractual commitments to clients.

A balance sheet is not required to be provided because Parlan Financial Corporation does not serve as a custodian for client funds or securities, and does not require prepayment of fees of more than \$1,200 per client, and six months or more in advance.

Business Continuity Plan

General

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

Disasters

The Business Continuity Plan covers natural disasters such as snow storms, hurricanes, tornados, and flooding. The Plan covers man-made disasters such as loss of electrical power, fire, and Internet outage. Electronic files are backed up daily and archived offsite.

Alternate Offices

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

Loss of Key Personnel

In the event that one of the owners becomes seriously ill or disabled the business will continue under the remaining shareholders leadership. In the case of death, the intention of the heir(s) of the majority stockholder is to continue the business in concert with the minority stockholder.

Information Security Program

Information Security

Parlan Financial Corporation maintains an information security program to reduce the risk that your personal and confidential information may be breached.

Privacy Notice

Parlan Financial Corporation is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us.

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

With your permission, we disclose limited information to attorneys, accountants, and mortgage lenders with whom you have established a relationship. You may opt out from our sharing information with these nonaffiliated third parties by notifying us at any time by telephone, mail, fax, email, or in person. With your permission, we share a limited amount of information about you with your brokerage firm in order to execute securities transactions on your behalf.

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

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

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

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

Brochure Supplement (Part 2B of Form ADV)

Education and Business Standards

Parlan Financial Corporation requires that advisors in its employ have a bachelor's degree and further coursework demonstrating knowledge of financial planning and tax planning. Examples of acceptable coursework include: an MBA, a CFP®, a CFA, a ChFC, JD, CTFA, EA or CPA. Additionally, advisors must have work experience that demonstrates their aptitude for financial planning and investment management. We prefer a minimum of three years experience involved with direct client responsibility.

Professional Certifications

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

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

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

Helyn Bolanis

Educational Background:

- Year of Birth: 1951
- University of Toledo

Business Experience:

- Parlan Financial Corporation (1988 - Present)

Disciplinary Information: None

Other Business Activities:

Helyn serves as the District Governor for Rotary District 6600 in Northwest Ohio.

Additional Compensation: None

Supervision:

Helyn is supervised by the Brian Hughes, Chief Compliance Officer. He reviews Helyn's work through frequent office interactions and compliance review.

Brian's contact information:
419-885-1130 bhughes@parlan.com

Bankruptcy Petition: None

Brian K. Hughes, CFP®

Educational Background:

- Year of birth: 1975
- The Ohio State University (1998)
- The College for Financial Planning (2003)

Business Experience:

- Parlan Financial Corporation (1999 – Present)

Disciplinary Information: None

Other Business Activities:

Brian serves as Treasurer for the non-profit Bethany House in Toledo Ohio.

Supervision:

Brian Hughes is supervised by Helyn Bolanis, President and CEO. She reviews Brian's work through frequent office interactions.

Helyn's contact information:
419-885-1130 hbolanis@parlan.com

Bankruptcy Petition: None