

Form ADV Part 2B

Disclosure Brochure

This brochure supplement provides information about John “Jack” Phelps, ChFC that supplements The *Relaxing Retirement Coach, Inc.*’s brochure. You should have received a copy of that brochure. If you have any questions about the contents of this brochure, please contact Jack Phelps, ChFC at (781) 235-7550 and/or info@TheRetirementCoach.com.

Additional information about Jack Phelps, ChFC is also available on the SEC’s website at www.adviserinfo.sec.gov.



**The
Relaxing
Retirement
Coach, Inc.**

Wellesley Office Park • 20 William Street, Suite 110 • Wellesley, MA 02481
781-235-7550 phone • 781-235-7551 fax • www.TheRetirementCoach.com

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Educational Background and Business Experience

John “Jack” M. Phelps

Born: 1967

Education:

BA Economics, Holy Cross College, 1989

Chartered Financial Consultant, ChFC, The American College, 1992

Business Background:

The *Relaxing* Retirement Coach, Inc. 2003 – Present
Founder, President and Chief Compliance Officer

Purshe Kaplan Sterling 2008 – 2010
Registered Representative

Strategic Planning Group, Inc. 1994 – 2003
Founder, President and Chief Compliance Officer

Prudential Financial Services 1989 – 1994
Registered Representative

Professional Designations:

Chartered Financial Consultant (ChFC)

Issued by: The American College

<http://www.theamericancollege.edu/financial-planning/chfc-advanced-financial-planning>

Prerequisites/Experience Required:

3 years of full-time business experience within the five years preceding the awarding of the designation

Educational Requirements: 6 core and 2 elective courses

Examination Type: Final proctored exam for each course

Continuing Education/Experience Requirements: 30 CE credits every 2 years

Disciplinary Information

Mr. Phelps has no disciplinary history to report.

Other Business Activities

RRC's president, John (Jack) Phelps is **not** a registered representative of a broker-dealer, a futures commissions merchant, commodity pool operator, or a commodity trading advisor.

Mr. Phelps may be appointed with several insurance companies and may be able to receive separate compensation for transactions implemented through various insurance companies. Members are not obligated to use any company for insurance product purchases, and may work with any insurance agent they choose. Insurance compensation will be separate and distinct from any fees charged by RRC. Mr. Phelps spends less than 1% of his time on insurance related issues.

Mr. Phelps, is also the President of *Profitable Retirement Coaching Systems, Inc.* (PRCS), which provides marketing and operational consulting to investment advisors. Mr. Phelps spends less than 10% of his time on PRCS business matters.

Additional Compensation

None of RRC's employees receive any economic benefit outside of regular salaries and bonuses.

Supervision

John (Jack) Phelps is the only Supervised Person named on this ADV Part 2B Investment Adviser Brochure Supplement. He may be reached at (781) 235-7550.



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