

## ADV PART 2B SUPPLEMENTAL BROCHURE

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MATTHEW J. LEMPNER  
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503- 496-0317

This brochure supplement provides information about the above named professional that supplements the Strategic Financial Partners, Ltd (SFP) brochure. You should have received a copy of that brochure. Please contact us by email at [carroll@advisoryfirm.com](mailto:carroll@advisoryfirm.com) if you did not receive SFP's brochure or if you have any questions about the contents of this supplement.

Additional information about the above named professional is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

**Matthew J. Lempner**      **Investment Advisor Representative (IAR)**

Education: Wake Forrest University, B.A. Economics, 1998

Business Background: 2009 – Present, SFP, IAR  
2004 – Present, LPL Financial, LLC, Registered Representative  
2004 – 2009, LPL, IAR

Mr. Lempner has no reportable disciplinary action history.

## Investment Related Activities

As previously disclosed Mr. Lempner is also a registered representative of LPL Financial, LLC (LPL), a broker-dealer and registered investment adviser unaffiliated with SFP through common ownership or control. There are no referral arrangements between SFP and LPL. No SFP client is obligated to use the advisory services of LPL, as no LPL advisory client is obligated to use the advisory services of SFP.

As this affiliation with LPL may present potential conflicts of interest, SFP has established written policies and procedures for insider trading that prohibit Mr. Lempner, and any other member, officer or employee of SFP, from buying, selling or recommending the securities of companies bought, sold or recommended by SFP where the decision is substantially derived, in whole or in part, by reason of access to the recommendations of SFP to its clients.

Mr. Lempner is also an insurance agent for various insurance companies. Advisory recommendations of SFP will typically include, as appropriate, specific recommendations for insurance products offered by these companies. As such, Mr. Lempner will be able to receive separate, yet customary commission compensation resulting from implementing insurance product transactions on behalf of advisory clients.

Mr. Lempner represents his non-advisory securities and insurance business under the d.b.a. Financial Health Alliance.

Mr. Lempner is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

**Item 5 – Additional Compensation**

Mr. Lempner does not receive any additional compensation to report.

**Item 6 – Supervision**

Grant Carroll is responsible for all supervision and monitoring of investment advice offered to clients by Mr. Lempner. Mr. Carroll can be reached at 503-467-7832. Mr. Carroll reviews all employee personal securities transactions on a quarterly basis, oversees all material compliance responsibilities, and conducts periodic testing to ensure that client objectives and mandates are being met.

**Item 7 – Requirements for State Registered Advisers**

Mr. Lempner has no reportable disciplinary action history.