

## ADV PART 2B SUPPLEMENTAL BROCHURE

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JAMES A. KUHLMAN

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).

## **Item 2 – Educational Background and Business Experience**

### **James A. Kuhlman    Investment Advisor Representative (IAR)**

Year of Birth:            1943

Education:                No Formal Post Secondary Education

Professional Designations:    Life Underwriter Training Council Fellow (LUTCF), 1988

The American College and the National Association of Insurance and Financial Advisors (NAIFA) issue this designation that gives an advisor a better understanding of a variety of insurance products. To earn the LUTCF designation, one must successfully complete 300 designation credits (or 5 courses) and one Ethics course – and be a NAIFA member in good standing during conferment year. Courses in the LUTCF Program are either in an 8-week or 12-week format.

Business Background:            2009 – Present, SFP, IAR  
   2005 – Present, LPL Financial, LLC (LPL), Registered Representative  
   2005 – 2009, LPL, IAR

## **Item 3 – Disciplinary Information**

Mr. Kuhlman has no reportable disciplinary action history.

## **Item 4 – Other Business Activity**

### **Investment Related Activities**

As previously disclosed Mr. Kuhlman is also a registered representative of 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. Kuhlman, 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. Kuhlman 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. Kuhlman will be able to receive separate, yet customary commission compensation resulting from implementing insurance product transactions on behalf of advisory clients.

#### Non Investment Related Activities

Mr. Kuhlman 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. Kuhlman 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. Kuhlman. 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. Kuhlman has no reportable disciplinary action history.