

## **Supervised Person Brochure**

Part 2B of Form ADV

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**Benjamin Don Coakley**

**Waypoint Strategic Advisors, LLC  
10570 Dorchester Road  
Summerville, SC 29483  
PHONE: 843-873-4420  
FAX: 843-873-5313  
EMAIL: [ben@waypointus.com](mailto:ben@waypointus.com)**

This brochure supplement provides information about Benjamin Coakley that supplements the Waypoint Strategic Advisors, LLC brochure. You should have received a copy of that brochure. Please contact Benjamin Coakley if you did not receive Waypoint Strategic Advisors, LLC brochure or if you have any questions about the contents of this supplement.

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

March 22, 2012

## Brochure Supplement (Part 2B of Form ADV)

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### Education and Business Standards

Advisory persons associated with WSA must possess, minimally, the following: a college degree and/or appropriate business experience and all required licenses.

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### 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](http://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.

Chartered Financial Consultant (ChFC): Chartered Financial Consultants are licensed by the American College to use the ChFC mark. ChFC certification requirements:

- Complete ChFC coursework within five years from the date of initial enrollment
- Pass the exams for all required elective courses. You must achieve a minimum score of 70% to pass.
- Meet the experience requirements: Three years of business experience immediately preceding the date of use of the designation are required. An undergraduate or graduate degree from an accredited educational institution qualifies as one year of business experience.
- Take the Professional Ethics Pledge.
- When you achieve your ChFC designation, you must earn your recertification every two years.

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### Item 2 Education and Business Standards

Educational Background:

- Date of birth: 09/28/1978

- Clemson University; BS in Marketing; 2000

**Business Experience:**

- Waypoint Strategic Advisors LLC; IAR; 01/2010 to Present
- Mass Mutual; Career Insurance Agent; 01/2004 to Present
- Strategic Financial Decisions, LLC.; Member/Chief Compliance Officer; 12/2004 to 11/2009
- Nicholas Gavalas; Sales Support/CSR/Career Agent; 08/2001 to 12/2003
- Conrem; Administrative Assistant; 03/2001 to 08/2001

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**Item 3 Disciplinary Information**

None to report

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**Item 4 Other Business Activities**

Benjamin Coakley has a financial industry affiliated business as an insurance agent. From time to time, he will offer clients advice or products from those activities. He may receive separate yet typical compensation in the form of commissions for the sale of insurance products.

These practices represent potential conflicts of interest because it gives Mr. Coakley an incentive to recommend products based on the commission amount received. This conflict is mitigated by the fact that Mr. Coakley has a fiduciary responsibility to place the best interest of the client first and the clients are not required to purchase any products. Clients have the option to purchase these products through another insurance agent of their choosing.

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**Item 5 Additional Compensation**

Benjamin Coakley does not receive any performance based fees.

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**Item 6 Supervision**

Benjamin Coakley is supervised by Matthew Coakley, Chief Compliance Officer. He reviews Benjamin's work through frequent office interactions.

Matthew Coakley's contact information:

PHONE: 843-873-4420      EMAIL: matt@waypointus.com