

**Item 1: Cover Page for Part 2B of Form ADV: Brochure Supplement**

**May 2012**

**Patrick Burgess**

**DAVINCI FINANCIAL DESIGNS LLC dba DAVINCI FINANCIAL DESIGNS  
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This brochure supplement provides information about James Agostini that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Agostini if you did not receive DaVinci Financial Designs' brochure or if you have any questions about the contents of this supplement.

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

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

**Patrick Burgess**

Born in 1967

### **Educational Background:**

- 1990: Marquette University; Bachelor of Arts in English
- 2007: University of South Carolina, Darla Moore School of Business; Certificate of Financial Planning

### **Business Background:**

- 05/2012 – Present DaVinci Financial Designs, LLC, Investment Adviser & CFP®
- 05/2012 – Present LPL Financial; Registered Representative
- 01/2000 – 05/2012 First Command Financial Planning; Financial Adviser

### **Licenses, Exams & Other Professional Designations**

- 1999: SC Life, Accident & Health Insurance
- 1999: Series 6 & Series 63
- 2007: Series 65
- 2008: Certified Financial Planner™
- 2010: SC Property & Casualty Insurance

### **CFP® - Certified Financial Planner™:**

The Certified Financial Planner™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and

client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;

- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Item 3. Disciplinary Information**

There are no legal or disciplinary events material to your evaluation of Patrick Burgess, we are required to disclose all material facts regarding those events.

### **Item 4. Other Business Activities**

Patrick Burgess is a registered representative of LPL Financial ("LPL"), member FINRA/SIPC. He may accept compensation for the sale of securities or other investment products, including distribution or service ("trail") fees from the sale of mutual funds. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products incentive to recommend products based on the compensation adviser and/or our supervised persons may earn and may not necessarily be in the best interests of the client.

Patrick Burgess, in his individual capacities, is also licensed insurance agent with various insurance companies, and in such capacity, may recommend, on a fully disclosed commission basis, the purchase of certain insurance products. While our firm does not sell such insurance products to our investment advisory clients, we permit Patrick Burgess, in his individual capacity as a licensed insurance agent, to sell insurance products to our investment advisory clients. A conflict of interest exists to the extent that our firm recommends the purchase of insurance products where Patrick Burgess receives insurance commissions or other additional compensation.

### **Item 5. Additional Compensation**

Patrick Burgess may receive from LPL or a mutual fund company, without cost and/or at a discount support services and/or products, to assist us to better monitor and service client accounts maintained at such institutions. Included within the support services, he may receive investment-related research, pricing information and market data, software and other technology that provide access to client account data, compliance and/or practice management-related publications, discounted or gratis consulting services, discounted and/or gratis attendance at conferences, meetings, and other educational and/or social events, marketing support, computer hardware and/or software and/or other products used by him to assist him in his investment advisory activities. Our clients do not pay more for investment transactions effected and/or assets maintained at LPL as result of this arrangement. There is no commitment made by him to LPL or any other institution as a result of the above arrangement.

### **Item 6. Supervision**

Jim Agostini is a principal of DaVinci Financial Designs and as such supervises and monitors Patrick Burgess's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Agostini if you have any questions about Patrick Burgess's brochure supplement at (803) 741-0134.