



**BROCHURE SUPPLEMENT**

**FORM ADV, PART 2B**

**JEANINE BODIE, CFP®**

**CRD# 5068564**

**DAVINCI FINANCIAL DESIGNS, LLC dba DAVINCI FINANCIAL DESIGNS**

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**FIRM CRD: 163362**

**JAMES S. AGOSTINI, CHIEF COMPLIANCE OFFICER**

**April 11, 2013**

This brochure supplement provides information about Jeanine Bodie that supplements our brochure. You should have received a copy of that brochure. Please contact Mrs. Bodie if you did not receive DaVinci Financial Designs' brochure or if you have any questions about the contents of this supplement.

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

**PLEASE RETAIN THIS BROCHURE FOR YOUR RECORDS**

# JEANINE BODIE

## EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Born in 1961

### **Educational Background:**

- 2004: University of South Carolina, Darla Moore School of Business – Financial Planning

### **Business Background:**

- 05/2012 – Present DaVinci Financial Designs, LLC, Financial Planner
- 05/2012 – Present LPL Financial; Registered Representative
- 05/2006 – Present Jeanine A. Bodie, LLC; Owner / Financial Planner
- 05/2006 – 05/2012 First Command Financial Planning; Financial Planner
- 02/1999 – 05/2006 State Farm Financial Services & Insurance Companies

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

- 2000: SC Insurance License
- 2004: Certified Financial Planner™:
- 2005: Series 6, Series 63 & Series 65

### **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.

### **Disciplinary Information**

There are no legal or disciplinary events material to your evaluation of Jeanine Bodie. We are required to disclose all material facts regarding those events.

### **Other Business Activities**

Jeanine Bodie is a registered representative of LPL Financial, member FINRA/SIPC and an agent for various insurance companies. As such, the advisor is paid separate, yet customary commissions from LPL Financial, third party investment management companies, issuing insurance company when you implement a recommendation to purchase a security investment or an insurance product. You, however, are not under any obligation to engage your advisor when considering implementing any recommendation to purchase a security or insurance. Implementing any or all of your advisor's recommendations is solely at your discretion.

You should be aware that when she receives compensation from other companies, it creates a conflict of interest that may impair the objectivity of the advisor when making advisory recommendations. DaVinci Financial Designs endeavors at all times to put the interest of its clients first as part of our fiduciary duty as a registered investment adviser; we take the following steps to address this conflict:

- we disclose to you the existence of all material conflicts of interest, including the potential for our firm and advisors be compensated from advisory clients in addition to our firm's advisory fees;
- we disclose to you that you are not obligated to implement your advisor's recommendations by purchases recommended investment and/or insurance products through our advisors;
- we collect, maintain and document accurate, complete and relevant client background information, including your financial goals, objectives and risk tolerance;
- our firm's management conducts regular reviews of each client account to verify that all recommendations made to you are suitable to your needs and circumstances;
- we require that our advisors seek prior approval of any outside employment activity so that we may ensure that any conflicts of interests in such activities are properly addressed;
- we periodically monitor these outside employment activities to verify that any conflicts of interest continue to be properly addressed by our firm;
- we educate our employees regarding the responsibilities of a fiduciary, including the need for having a reasonable and independent basis for the investment advice provided to you.

We refer you to the following sections of our Firm Brochure for more detailed information regarding our affiliations with certain parties: "Third Party Money Managers" under "About Our Services" and "Fees."

### **Additional Compensation**

Jeanine Bodie is paid by sponsoring mutual fund companies for providing advisory services to benefit employers and employee at no fee for our services and we receive advisory fees from third party money managers to whom we refer clients. Both of these circumstances are described in greater detail under "About Our Services" In our Firm Brochure.

Jeanine Bodie may also be compensated by LPL Financial, our broker-dealer, in different ways, for example, payments based on production, reimbursements of fees we pay to LPL Financial for items such as administrative services, and other things of value such as free or reduced-costs marketing materials, payments in connection with the transition of an advisor's association from another investment advisor and/or broker dealer to us and LPL Financial, or attendance at LPL conferences and events. These payments are typically received by advisors based on the advisors overall production and/or on the amount of assets serviced by LPL as broker dealer. As a result of this compensation, our advisors may have a financial incentive to recommend some services or programs to you.

Jeanine Bodie may benefit when LPL Financial or a mutual fund company, without cost and/or at a discount, provides us support services and/or products, to assist us to better monitor and service client accounts maintained at such institutions. Included within the support services we may receive investment-related research, pricing information and market data, computer hardware and/or

software and other technology to assist us in our investment advisory business operations, compliance and/or practice management-related publications, consulting services, attendance at conferences, meetings, and other educational and/or social events, marketing support.

You do not pay more for investment transactions effected and/or assets maintained at LPL Financial as a result of these arrangements. There is no commitment made by us to LPL Financial or any other institution as a result of the above arrangement.

### **Supervision**

Jim Agostini is a principal of DaVinci Financial Designs and as such supervises and monitors Jeanine Bodie'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 Jeanine Bodie's brochure supplement at (803) 741-0134.

### **Requirements for State-Registered Advisers**

Mrs. Bodie has no information to disclose.