

**Part 2B of Form ADV: *Brochure Supplement***

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Whelan Financial

Fresno, CA 93711

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This *Brochure Supplement* provides information about Portia L. White, CFP® and supplements the Whelan Financial brochure. Please contact Mrs. White at (559) 228-8002 if you have any questions about the contents of this supplement.

Additional information about Portia L. White, CFP® is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 Educational, Background and Business Experience:**

**Full Legal Name:** Portia L. White, CFP®

**Born:** 1978

### **Education**

- California State University, Fresno; BA, Philosophy; Summa Cum Laude 2004

### **Business Experience**

- Whelan Financial; from 11/1/2004 to Present. She is a CERTIFIED FINANCIAL PLANNER™ Practitioner , Vice President, Secretary and a Senior Advisor.

### **Designations**

Portia L. White, CFP® has earned the following designation and is in good standing with the granting authority:

- CFP®; Certified Financial Planner Board of Standards, Inc.: 2009

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 68,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, currently 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 of 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® professional 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. (Source: Certified Financial Planner Board of Standards, Inc.)

### **Item 3 Disciplinary Information**

Portia L. White, CFP® has no reportable disciplinary history.

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

#### **A. Investment-Related Activities**

1. Portia L. White, CFP® is not engaged in any other investment-related activities.
2. Portia L. White, CFP® does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

#### **B. Non Investment-Related Activities**

Portia L. White, CFP® is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

## **Item 5 Additional Compensation**

Portia L. White, CFP® does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## **Item 6 Supervision**

**Supervisor:** Vincent J. Whelan, CFP®

**Title:** President

**Phone Number:** (559) 228-8002

Portia L. White, CFP® reports to Vincent J. Whelan, CFP® for all her activities and responsibilities related to Whelan Financial business.

Vincent J. Whelan, CFP®, is responsible for the supervision, formulation and monitoring of investment advice offered to clients. Mr. Whelan reviews and oversees all material investment policy changes and conducts periodic testing to ensure that client objectives and mandates are being met. He can be contacted at (559) 228-8002.