



Part 2B of Form ADV: *Brochure Supplement*

Taylor J. Whelan
Investment Advisor Representative

Whelan Financial

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

Additional information about Taylor J. Whelan is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational, Background and Business Experience

Full Legal Name: Taylor J. Whelan **Born:** 1985

Education

- Santa Clara University; BA, Philosophy: 2008
- College for Financial Planning: matriculating towards becoming a CERTIFIED FINANCIAL PLANNER™ practitioner: 2/2015

Business Experience

- Whelan Financial from 7/2008 to 12/2010; Wellington Management Company, LLP from 3/2011 to 5/2012; Wellington Hedge Management from 6/2012 to 10/2014; Whelan Financial from 11/17/2014 to present. He is an Investment Advisor Representative and holds a Series 65 license.

Certifications/Designations

Taylor J. Whelan does not currently hold any certifications or designations.

Item 3 Disciplinary Information

Taylor J. Whelan has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

1. Taylor J. Whelan is not engaged in any other investment-related activities.
2. Taylor J. Whelan does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

B. Non-Investment Related Activities

Taylor J. Whelan 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

Taylor J. Whelan does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6 Supervision

Supervisor: Portia L. White, CFP®

Title: Vice President

Phone Number: (559) 228-8002

Taylor J. Whelan reports to Portia L. White, CFP® for all his 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.