

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

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Firm Contact:
Mark Shone, Chief Compliance Officer

Firm Website Address:
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This brochure supplement provides information about Mark Shone that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Shone if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Mark Shone is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

Mark W. Shone, CFP®

Born: 1966

Education:

- ❖ B.S. Business Administration with a concentration in Finance, California State University, Sacramento, 1989

Business Experience:

- ❖ Manager, Shone Asset Management LLC, 2005 to Present
- ❖ Investment Adviser Representative, SAS Financial Advisors LLC, 2014 to present
- ❖ Managing Director, Neuberger Berman, a Lehman Brothers Company, 1995 to 2005

Exams, Licenses & Other Professional Designations:

- ❖ 2000 – Series 65
- ❖ CFP®

CFP® - Certified Financial Planner™:

The Certified Financial Planner™, CFP® and federally registered 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 high standard of professional education, stringent code of conduct and standards of practice and ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: 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, pass the comprehensive CFP® Certification Examination, Complete at least three years of full-time financial planning-related experience and agree to be bound by CFP Board's *Standards of Professional Conduct*.

Individuals who become certified must 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 industry and 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.

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to your evaluation of Mr. Shone.

Item 4: Other Business Activities

Mr. Shone does not have any other business activities to disclose.

Item 5: Additional Compensation

Mr. Shone does not receive any economic benefits for providing investment advice from anyone other than our firm's Clients.

Item 6: Supervision

Mr. Shone is the sole principal and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.