

This brochure supplement provides information about Jack Patrona that supplements the Financial Planning & Consulting Services, Inc brochure. You should have received a copy of that brochure. Please contact Jack Patrona, President if you did not receive Financial Planning & Consulting Services, Inc's brochure or if you have any questions about the contents of this supplement.

Additional information about Jack Patrona is also available on the SEC's website at www.adviserinfo.sec.gov.

Financial Planning & Consulting Services, Inc

Form ADV Part 2B – Individual Disclosure Brochure

for

Jack Patrona

Investment Adviser Representative

Financial Planning & Consulting Services, Inc
4711 Avenida de los Suenos
Yorba Linda, California, 92886
(714) 970-2511
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UPDATED: 02/14/2016

Item 2: Educational Background and Business Experience

Name: Jack Patrona

Born: 1949

Education Background and Professional Designations:

Education:

BS Microbiology, CSULB - 1982

MBA Business/Finance, CSUF - 1992

BA Accounting, CSUF - 2002

Designations:

Enrolled Agent

Enrolled Agent Minimum Qualifications:

☐ **Written Examination:** One can become an enrolled agent by demonstrating special competence in tax matters by taking a written examination. This track requires that one: -

- Apply to take the Special Enrollment Examination (SEE); prometric.com/irs;
- Achieve passing scores on all parts of the SEE;
- Apply for enrollment; and
- Pass a background check to ensure that applicant has not engaged in any conduct that would justify the suspension or disbarment of an attorney, CPA, or enrolled agent from practice before the IRS.

☐ **IRS Experience:** Or one can become an enrolled agent by virtue of past service and technical experience with the IRS that qualifies you for enrollment. This track requires that one: -

- Possess the years of past service and technical experience specified in [Circular 230](#);
- Apply for enrollment; and
- Pass a background check to ensure that applicant has not engaged in any conduct that would justify the suspension or disbarment of an attorney, CPA, or enrolled agent from practice before the IRS.

Business Background:

1983 - Present

President/CEO

Financial Planning & Consulting Services, Inc

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Jack Patrona is an Enrolled Agent. From time to time, he will offer clients advice or products from those activities. FPCS always acts in the best interest of the client. Clients are in no way required to use the services of any representative of FPCS in their capacity as an Enrolled Agent.

Item 5: Additional Compensation

Other than salary, annual bonuses, regular bonuses, Jack Patrona does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Financial Planning & Consulting Services, Inc.

Item 6: Supervision

As the majority owner and representative of Financial Planning & Consulting Services, Inc, Jack Patrona supervises all duties and activities. Jack Patrona's contact information is on the cover page of this disclosure document.