



A REGISTERED INVESTMENT ADVISOR

## Part 2B of Form ADV: Brochure Supplement



### **Stephen C. Detweiler**

#### **Investment Advisor Representative**

**B.A. Mathematics, California State University, Fresno 2009**

With a background in mathematics, Stephen's analytical mind and ability to grasp and apply complex data continues to be an invaluable asset to Whelan Financial. Our clients are drawn to Stephen. His unfaltering dedication and ability to pare down complex topics into clear and concise bits of information demonstrate both heart and mental fortitude. Stephen's abilities have earned him respect from both clients and peers alike.

When Stephen is not meeting with his own clients or studying for his Certified Financial Planner™ certification, he oversees day-to-day trading operations and is integral in providing research in the areas of investment and financial planning. Stephen's exceptional work ethic is matched only by his efforts to provide clients with the advice they need to confidently move forward in their financial endeavors.

**Whelan Financial**  
735 W. Alluvial Ave. Suite 101  
Fresno, CA 93711  
Telephone: 559-228-8002

This *Brochure Supplement* provides information about Stephen C. Detweiler 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.

03/23/2017

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

# Educational, Background and Business Experience

**Full Legal Name:** Stephen C. Detweiler

**Born:** 1979

## Education:

- California State University, Fresno: BA, Mathematics: 2009
- College for Financial Planning: matriculating towards becoming a CERTIFIED FINANCIAL PLANNER™ practitioner: 10/2014

## Business Experience:

- Whelan Financial from 5/31/2010 to Present. He is an Investment Advisor Representative and holds a Series 65 license

## Designations:

- Stephen C. Detweiler has earned the following designation and is in good standing with the granting authority:
  - REGISTERED PARAPLANNER<sup>SM</sup> designee: 2011REGISTERED PARAPLANNER<sup>SM</sup> and RP<sup>SM</sup> are service marks of the College for Financial Planning®

## Disciplinary Information

Stephen C. Detweiler has no reportable disciplinary history.

## Additional Compensation

Stephen C. Detweiler does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## Other Business Activities

### A. Investment Related Activities

1. Stephen C. Detweiler is not engaged in any other investment related activities.
2. Stephen C. Detweiler does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

### B. Non-Investment Related Activities

Stephen C. Detweiler is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

## Supervision

**Supervisor:** Portia L. White, CFP®

**Title:** Vice President

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

Stephen C. Detweiler 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.