

This brochure supplement provides information about Nancy Jane Overton that supplements the Total Wealth Planning and Management, Inc. brochure. You should have received a copy of that brochure. Please contact Nancy Jane Overton if you did not receive Total Wealth Planning and Management, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Nancy Jane Overton is also available on the SEC's website at www.adviserinfo.sec.gov.

Total Wealth Planning and Management, Inc.

Form ADV Part 2B – Individual Disclosure Brochure

for

Nancy Jane Overton

Personal CRD Number: 354496

Investment Adviser Representative

Total Wealth Planning and Management, Inc.

822 A1A North Suite 310

Ponte Vedra Beach, FL 32082

(866) 568-0003

nancy.overton@totalwpm.com

UPDATED: 09/24/2018

Item 2: Educational Background and Business Experience

Name: Nancy Jane Overton **Born:** 1940

Educational Background and Professional Designations:

Education:

Bachelor Business Administration, Duke University - 1962

Business Background:

09/2018 - Present	Investment Adviser Representative/Financial Advisor Total Wealth Planning and Management, Inc.
10/2012 - 08/2018	Wealth Manager Beverly Hills Wealth Management LLC
10/2010 - 10/2012	Wealth Manager Wells Fargo Finet
10/2004 - 10/2010	Assoc. Vice President Smith Barney

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

Nancy Jane Overton is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

Nancy Jane Overton does not receive any economic benefit from any person, company, or organization, other than Total Wealth Planning and Management, Inc. in exchange for providing clients advisory services through Total Wealth Planning and Management, Inc..

Item 6: Supervision

As a representative of Total Wealth Planning and Management, Inc., Nancy Jane Overton is supervised by William Richard Tomes, the firm's Chief Compliance Officer. William Richard Tomes is responsible for ensuring that Nancy Jane Overton adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for William Richard Tomes is (866) 568-0003.