

*This brochure supplement provides information about Kim Tejls Mortensen that supplements the Total Wealth Planning and Management, Inc. brochure. You should have received a copy of that brochure. Please contact Kim Tejls Mortensen, Investment Adviser Representative 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 Kim Tejls Mortensen is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

**Total Wealth Planning and Management, Inc.**  
**Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**Kim Tejls Mortensen**  
Personal CRD Number: 4733622  
Investment Adviser Representative

*Kim Tejls Mortensen does not offer advisory services to New York residents or residents of other states in which he is not licensed.*

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## **Item 2: Educational Background and Business Experience**

**Name:** Kim Tejls Mortensen **Born:** 1949

### **Education Background:**

#### **Education:**

BA Engineering, SUNY at Stony Brook - 1971

### **Business Background:**

06/2013 - Present	Investment Adviser Representative Total Wealth Planning and Management, Inc.
01/2010 - Present	FAA Contractor, Aviation Consultant and Instructor Hi-Tec Systems
05/2012 - 12/2016	Registered Representative Raymond James Financial Services, Inc.
05/2012 - 12/2016	Investment Adviser Representative Raymond James Financial Services Advisors, Inc.
03/2007 - 06/2014	Pilot US Airways
05/2009 - 08/2012	Registered Representative Walnut Street Securities, 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**

Kim Tejls Mortensen is currently an FAA Contractor, Aviation Consultant and Instructor for Hi-Tec Systems. He considers these activities as his primary employment.

#### **Item 5: Additional Compensation**

Other than salary, annual bonuses, or regular bonuses, Kim Tejls Mortensen does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Total Wealth Planning and Management, Inc.

#### **Item 6: Supervision**

As the representative of Total Wealth Planning and Management, Inc., Kim Tejls Mortensen works closely with William Richard Tomes, Jr. Kim Tejls Mortensen's contact information is on the cover page of this disclosure document. Kim Tejls Mortensen adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements. William Richard Tomes, Jr.'s contact information is (866) 568-0003.