

***Cover Page***

**TREY VINEYARD**

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Phoenix, AZ 82018**

**Phone: (480) 999-3033**

January 2, 2018

**FORM ADV PART 2  
BROCHURE SUPPLEMENT**

**This brochure supplement provides information about Trey Vineyard that supplements the SharpePoint, LLC brochure. You should have received a copy of that brochure. Please contact Trey Vineyard if you did not receive a SharpePoint, LLC's brochure or if you have questions about this supplement. Mr. Vineyard's CRD number is 5516897.**

**Additional information about Trey Vineyard is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Educational Background and Business Experience***

Trey Vineyard  
Managing Partner and CCO  
Year of Birth: 1985

**Business Background:**

SharpePoint, LLC, Managing Partner/CCO, December 2017 - Present

Private Advisor Group, LLC d/b/a SharpePoint, LLC, Investment Advisor Representative,  
October 2012 – Present

LPL Financial, LLC d/b/a/ SharpePoint, LLC, Registered Representative, October 2012 - Present

Waddell & Reed, Financial Advisor, April 2008 – October 2012

**Educational Background:**

University of Arizona, Bachelor of Art in Accounting, Graduated: 2007

**RELEVANT DESIGNATIONS:**

**CERTIFIED FINANCIAL PLANNER <sup>TM</sup> Practitioner (CFP®)**

This program is sponsored by the CFP Board of Standards. Before applying for the CFP® Certification Examination, you need to meet the six course education requirements (or their equivalent) as set by CFP Board as well as a financial plan development course registered with CFP Board. Additionally, a bachelor's degree (or higher), or its equivalent, in any discipline, from an accredited college or university is required to attain CFP® certification. Additional requirements include successful completion of the CFP® Certification Examination, which tests your ability to apply your financial planning knowledge to client situations. The 10-hour exam is divided into three separate sessions. Because of the integrated nature of financial planning, however, each session may cover all topic areas (personal financial planning, risk management, income taxes, investments, retirement planning, and estate planning). In addition to the education requirements, there is an experience requirement, which is currently at least three years of qualifying full-time work experience in personal financial planning. There are additional requirements for candidates and registrants to pass Fitness Standards and a Background Check and to agree to abide by CFP Board's *Code of Ethics and Professional Responsibility*, *Rules of Conduct* and *Financial Planning Practice Standards*. Certificants must continue to meet continuing education requirements which presently include obtaining 30 hours of continuing education in selected subjects every two calendar years, including a two-hour CFP Ethics course. For more details, see [www.cfp.net](http://www.cfp.net).

### ***Disciplinary Information***

Mr. Vineyard does not have any reportable disciplinary disclosures.

Form ADV, Part 2B, Item 4

### ***Other Business Activities***

Trey Vineyard has a financial industry affiliated business as an insurance agent. Not more than 30% of his time is spent on these activities. From time to time, he offers clients advice or products from those activities. He may receive separate yet typical compensation in the form of commissions for the sale of insurance products.

These practices represent a conflict of interest because it gives Mr. Vineyard an incentive to recommend products based on the commission amount received. This conflict is mitigated by the fact that Mr. Vineyard has a fiduciary responsibility to place the best interest of the client first and the clients are not required to purchase any products. Clients have the option to purchase these products through another insurance agent of their choosing.

Mr. Vineyard is also involved with D’Vine Financial, LLC as a Tax Conduit. Additionally, he owns rental properties.

Form ADV, Part 2B, Item 5

### ***Additional Compensation***

Trey Vineyard does not receive any economic benefit from anyone, who is not a client, for providing advisory services.

Form ADV, Part 2B, Item 6

### ***Supervision***

SharpePoint, LLC has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the Securities and Exchange Commission and Investment Advisers Act of 1940. Mr. Vineyard is SharpePoint, LLC’s Chief Compliance Officer, therefore he is responsible for all of the activities that occur on behalf of SharpePoint, LLC and its clients.

Form ADV, Part 2B, Item 7

### ***Requirements for State-Registered Advisers***

Trey Vineyard does not have any reportable disciplinary events required to be disclosed in this section.