

Cover Page

BRIAN ROBINSON

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Phone: (480) 999-3033

April 29, 2019

**FORM ADV PART 2
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Brian Robinson that supplements the SharpePoint, LLC brochure. You should have received a copy of that brochure. Please contact Brian Robinson if you did not receive a SharpePoint, LLC's brochure or if you have questions about this supplement. Mr. Robinson's CRD number is 4299085.

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

Educational Background and Business Experience

Brian Robinson
Managing Partner and CCO
Year of Birth: 1972

Business Background:

SharpePoint, LLC, Managing Partner/CCO, January 2018 – Present

Private Advisor Group, LLC d/b/a SharpePoint, LLC, Investment Advisor Representative,
October 2012 – January 2018

LPL Financial, LLC d/b/a SharpePoint, LLC, Registered Representative, October 2012 – January 2018

Waddell & Reed, Financial Advisor, September 2001 – October 2012

Educational Background:

Arizona State University, Bachelor of Art in Economics, Graduated: 2000

RELEVANT DESIGNATIONS:

CERTIFIED FINANCIAL PLANNER TM 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.

ACCREDITED WEALTH MANAGEMENT ADVISOR (AWMA)

Individuals who hold the AWMA® designation have completed a course of study encompassing wealth strategies, equity-based compensation plans, tax reduction alternatives, and asset protection alternatives. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

ACCREDITED ASSET MANAGEMENT SPECIALIST (AAMS)

Accredited Asset Management Specialist (AAMS) is a professional designation awarded by the College for Financial Planning (CFP) to financial professionals who successfully complete a self-study program, pass an exam, and agree to comply with a code of ethics.

CHARTERED MUTUAL FUND COUNSELOR (CMFC)

A professional designation awarded by the College for Financial Planning to financial services professionals who complete a study program and pass an exam covering [mutual fund](#) topics. Successful applicants earn the right to use the CMFC designation with their names for two years, which can improve job opportunities, professional reputation and pay. Every two years, CMFC professionals must complete 16 hours of continuing education to continue using the designation.

Form ADV, Part 2B, Item 3

Disciplinary Information

Mr. Robinson does not have any reportable disciplinary disclosures.

Form ADV, Part 2B, Item 4

Other Business Activities

Brian Robinson 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. Robinson an incentive to recommend products based on the commission amount received. This conflict is mitigated by the fact that Mr. Robinson 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. Robinson is involved with RFA, LLC as a Tax Conduit. Additionally, he is involved with PV Sports, LLC.

Form ADV, Part 2B, Item 5

Additional Compensation

Brian Robinson 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 Arizona Investment Advisers Act. Mr. Robinson, (480) 999-3033, 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

Brian Robinson does not have any reportable disciplinary events required to be disclosed in this section.