

**ITEM 1: COVER PAGE**  
**PART 2B OF FORM ADV: BROCHURE SUPPLEMENT**  
**MARCH 2019**



**Michael Syman-Degler, CFP®**

**Syman-Degler Group, LLC**  
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**Eugene, OR 97401**  
**[www.Syman-Degler.com](http://www.Syman-Degler.com)**

**Firm Contact:**  
**Michael Syman-Degler, CFP®**  
**Chief Compliance Officer**

This brochure supplement provides information about Mr. Syman-Degler that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Syman-Degler at (541) 345-9681 if you did not receive Syman-Degler Group, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Syman-Degler is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #2886918.

## ITEM 2: EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

**MICHAEL SYMAN-DEGLER, CFP®**

**YEAR OF BIRTH: 1947**

### **EDUCATIONAL BACKGROUND:**

- ☐ 1969: University of Illinois – Champaign; Bachelor of Science in AG Econ/Agronomy

### **BUSINESS BACKGROUND:**

- ☐ 05/2018 – Present Syman-Degler Group, LLC; Managing Member, Chief Compliance Officer & Investment Adviser Representative
- ☐ 09/1993 – 05/2018 Farmers Insurance & Financial Services dba Syman-Degler Agency; Appointed Agent

### **EXAMS, LICENSES & OTHER PROFESSIONAL DESIGNATIONS:**

- ☐ 2005: CERTIFIED FINANCIAL PLANNER, CFP®
- ☐ 2001: Chartered Life Underwriter (CLU®)
- ☐ 1998: Life Underwriting Training Council Fellow (LUTCF)
- ☐ 1996: Series 7 & 63 Exams
- ☐ 1994: Oregon Insurance Licensed

The CFP® certification is earned by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam and agreeing to be bound by the CFP® board's *Standard of Professional Conduct*. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the *Standards of Professional Conduct*.

The CLU® is offered by The American College. The CLU® designation is obtained by completing 8 core, 3 elective courses and a final exam for each course. As a prerequisite the IAR must have 3 years of full time business experience within the 5 years preceding the awarding of the designation. All candidates must meet ethics standards and agree to comply with The American College Code of Ethics and Procedures. This designation requires 30 hours of continuing education every 2 years.

The LUTCF educational program includes required ethical training and five elective courses chosen from such topics as meeting client needs, serving personal markets, essentials of business insurance, annuities, long-term care, life insurance products, and retirement, investment, and estate planning. An LUTCF has studied the fundamental skills required for an insurance agent and must adhere to an ongoing ethical standard when serving clients. The designation is offered by The American College, a non-profit educator with an 84-year heritage and the highest level of accreditation, in association with the National Association of Insurance and Financial Advisors ("NAIFA").

### **ITEM 3: DISCIPLINARY INFORMATION<sup>1</sup>**

There are no legal or disciplinary events material to the evaluation of Mr. Syman-Degler.

### **ITEM 4: OTHER BUSINESS ACTIVITIES**

Mr. Syman-Degler is a licensed insurance agent/broker. He may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Syman-Degler, as a fiduciary, will act in the client's best interest.

### **ITEM 5: ADDITIONAL COMPENSATION**

Mr. Syman-Degler does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### **ITEM 6: SUPERVISION**

Mr. Syman-Degler is the sole owner and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.

### **ITEM 7: REQUIREMENTS FOR STATE-REGISTERED ADVISERS**

Mr. Syman-Degler has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.



<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.