



Robasciotti & Philipson

870 Market Street, Suite 1275
San Francisco, CA 94102
(415) 986-5500
www.robasciotti.com

SHANNON BLACKMON

This brochure supplement provides information about Shannon Blackmon that supplements the Robasciotti & Philipson brochure. You should have received a copy of that brochure. Please contact Chief Compliance Officer, Cassandra “Sandy” Holmes, if you did not receive Robasciotti & Philipson’s brochure or if you have any questions about the contents of this supplement. Additional information about Shannon Blackmon is available on the SEC’s website at www.adviserinfo.sec.gov.



Item 2 – Educational Background and Business Experience

Shannon Marie Blackmon

Year Born: 1974

Educational Background

Executive Certificate in Financial Planning – Boston University (2014)

Bachelor of Arts, Psychology – University of Arizona (2013)

Business Background (Preceding 5 Years)

July 2017 – Present: Associate Wealth Manager, Robasciotti & Philipson

September 2015 – July 2017: Client Service Associate, Robasciotti & Philipson

August 2013 – September 2015: Insurance Agent, All Bay Risk Management & Insurance Services

November 2012 – August 2013: Financial Representative, New England Financial

Professional Qualifications

Series 7, General Securities Representative Examination (2013)

Series 66, Uniform Combined State Law Examination (2013)

Professional Qualifications

CERTIFIED FINANCIAL PLANNER™ certification (2014)

CFP® certification is granted by the CFP® Board and requires a bachelor's degree (or higher) or its equivalent from an accredited college or university, completing a CFP® Board-Registered Program or its equivalent, passing the comprehensive CFP® Certification Exam, and 6,000 hours of professional experience related to the financial planning process.

Item 3 – Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this item for Shannon Blackmon.

Item 4 – Other Business Activities

Shannon Blackmon does not receive commissions, performance based fees, or any compensation other regular salary, bonuses, and shareholder draws from Robasciotti & Philipson.

Item 5 – Additional Compensation

Shannon Blackmon does not receive commissions, performance based fees, or any compensation other regular salary and bonuses from Robasciotti & Philipson.

Item 6 – Supervision

Robasciotti & Philipson has appointed a Chief Compliance Officer, Cassandra “Sandy” Holmes, who reviews and monitors employee activity with respect to the rules and regulations. In addition, Robasciotti & Philipson has adopted a Code of Ethics that requires each employee to act in the best interest of clients at all times. Should you have questions related to these activities, please contact Cassandra “Sandy” Holmes at the address or telephone number on the cover page of this document.