



Item 1. Cover Page
Firm
Brochure
(Part 2A of Form ADV)

BURRUS FINANCIAL SERVICES, INC.
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This brochure provides information about the qualifications and business practices of Burrus Financial Services, Inc. If you have any questions about the contents of this brochure, please contact us at: (801) 532-0505, or by email at: info@burrus.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission, or by any state securities authority.

While Burrus Financial Services, Inc. may refer to itself as a "Registered Investment Advisor" clients should be aware that registration itself does not imply any level of skill or training.

Additional information about Burrus Financial Services, Inc. is available on the SEC's website at www.adviserinfo.sec.gov (the CRD number for Burrus Financial Services, Inc. is 141435).

Item 2. Material Changes

Annual Update

The material Changes section of this brochure will be updated annually or when material changes occur. The last annual filing was submitted March 2023.

Material Changes since the last update

There have not been any material changes made to this brochure since the last annual filing.

Full Brochure Available

Whenever you would like to receive a complete copy of our Firm Brochure, please contact us by telephone at: (801) 532-0505 or by email at info@burrusfinancial.com.

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Item 4. Advisory Business

Firm Description

Burrus Financial Services, Inc. (“Burrus Financial”) is an SEC-registered investment adviser with its principal place of business located in Salt Lake City, Utah. Burrus Financial began conducting business in 2007.

Burrus Financial provides personalized confidential financial planning and investment management to individuals, high net worth individuals, corporations, or other small businesses. Advice is provided through consultation with the client and may include: determination of financial objectives, identification of financial problems, cash flow management, tax planning, insurance review, investment management, education funding, retirement planning, and estate planning.

Burrus Financial is strictly a fee-only financial planning and investment management firm. The firm does not receive commissions for purchasing or selling annuities, insurance, stocks, bonds, mutual funds, limited partnerships, or other commissioned products. No commissions in any form are accepted. No finder’s fees are accepted.

Investment advice is an integral part of financial planning. In addition, Burrus Financial advises clients regarding cash flow, college planning, retirement planning, tax planning, and estate planning.

Burrus Financial may be deemed to have constructive custody of certain client assets due to (i) Burrus’ ability to deduct fees directly from client accounts, and/or (ii) having access to client log in information to help manage outside assets such as 401(k) plans, retirement plans, pension plans etc. The client always maintains asset control. Burrus Financial places trades for clients under a limited power of attorney.

Periodic reviews are also communicated to provide reminders of the specific courses of action that need to be taken. More frequent reviews occur but are not necessarily communicated to the client unless immediate changes are recommended.

Other professionals (e.g., lawyers, accountants, insurance agents, etc.) are engaged directly by the client on an as-needed basis. Conflicts of interest will be disclosed to the client in the unlikely event they should occur.

The initial meeting, which may be by telephone, is free of charge and is considered an exploratory interview to determine the extent to which financial planning and investment management may be beneficial to the client.

Principal Owners

Jeffrey B. Bland owns 100% of Burrus Financial Services, Inc.

Types of Advisory Services

As of December 31, 2023 Burrus Financial manages approximately \$223 million in assets for approximately 375 clients. All assets are managed on a discretionary basis. We do not manage any accounts on a non-discretionary basis.

Burrus Financial provides asset management services; manages investment advisory accounts performed on a discretionary basis. Burrus Financial does not offer or sponsor a wrap fee program.

➤ Investment Advisory Services & Financial Planning Services

Most clients choose to have Burrus Financial manage their assets in order to obtain ongoing in-depth advice. All aspects of the client's financial affairs are reviewed. Realistic and measurable goals are set and objectives to reach those goals are defined. As goals and objectives change over time, suggestions are made and implemented on an ongoing basis. Detailed investment advice and specific recommendations are provided as part of a financial plan. Implementation of recommendations is at the discretion of the client.

The scope of work and fee for an Investment Advisory Agreement may be provided to the client in writing prior to the start of the relationship. An investment Advisory Agreement may include: cash flow management; insurance review; investment management (including performance reporting); education planning; retirement planning; estate planning; and tax planning, as well as the implementation of recommendations within each area.

The financial plan is an additional service provided at no extra cost or obligation to our clients. The financial plan may include but is not limited to: a net worth statement; a cash flow statement; a review of investment accounts, including reviewing asset allocation and providing repositioning recommendations; strategic tax planning; a review of retirement accounts and plans including recommendations; one or more retirement scenarios; estate planning review and recommendations.

Tailored Relationships

The goals and objectives for clients are documented in our client relationship management system. Clients may impose restrictions on investing in certain securities or types of securities.

Asset Management

Assets are invested primarily in no-load or low-load mutual funds and exchange-traded funds, usually through discount brokers or fund companies. Fund companies charge each fund shareholder an investment management fee, along with other fees related to the ownership of mutual funds. These fees are disclosed in the fund prospectus. Discount brokerages may charge a transaction fee for the purchase of some funds. Burrus Financial does not receive any compensation, in any form, from fund companies.

Stocks and bonds may be purchased or sold through a brokerage account when appropriate. The brokerage firm may charge a transaction fee for stock and bond trades.

Investments may also include: equities (stocks), warrants, corporate debt securities, commercial paper, certificates of deposit, municipal securities, investment company securities (variable life insurance, variable annuities, and mutual funds shares) and U.S. government securities. Initial public offerings (IPOs) are not available through Burrus Financial.

Item 5. Fees and Compensation

Description

Burrus Financial bases its fees on a percentage of assets under management. Burrus Financial does not charge a separate fee for financial planning or consultations. Burrus Financial does not offer or sponsor any wrap fee programs. Compensation to the Advisor for its services will be calculated in accordance with “the Investment Advisory Agreement”. Fees may be paid directly from the account by the custodian. Clients will receive statements from the custodian showing all debits and credits to accounts including the amount of fees, at least as often as the Burrus Financial reports are provided. Payment of fees may result in the liquidation of the Client’s securities if there is insufficient cash in the account.

The Advisor’s fees may be negotiated in individual situations. Examples of these situations include: Pre-existing relationships, family members, or at the discretion of the advisor.

Although the Investment Advisory Agreement is an ongoing agreement and constant adjustments are required, the length of service to the client is at the client's discretion. The portfolio value at the completion of the prior full billing quarter is used as the basis for the fee computation, adjusted for the number of days during the billing quarter prior to termination.

Fee Billing

Investment management fees are billed and payable quarterly in advance based on the value of your account on the last business day of the previous quarter. Fees are usually deducted from a designated client account to facilitate billing.

Annualized Fees

From	To	Per Quarter	Per Year
-	\$1,000,000	.34%	1.35%
\$1,000,001	\$3,000,000	.25%	1.00%
\$3,000,001	\$5,000,000	.19%	0.75%
\$5,000,001	and higher	Negotiable	<hr/>

Other Fees

At our discretion, we may combine the account values of family members living in the same household to determine the applicable advisory fee. For example, we may combine account values for you and your minor children, joint accounts with your spouse, and other types of related accounts. Combining account values may increase the asset total, which may result in your paying a reduced advisory fee based on the available breakpoints in our fee schedule stated above.

If the Investment Advisory Agreement is executed at any time other than the first day of a calendar quarter, our fees will apply on a pro rata basis, which means that the advisory fee is payable in proportion to the number of days in the quarter for which you are a client.

Custodians may charge transaction fees on purchases or sales of certain mutual funds and exchange-traded funds. These transaction charges are usually small and incidental to the purchase or sale of a security. The selection of the security is more important than the nominal fee that the custodian charges to buy or sell the security.

Burrus Financial, in its sole discretion, may waive its minimum fee and/or charge a lesser investment advisory fee based upon certain criteria (e.g., historical relationship, type of assets,

anticipated future earning capacity, anticipated future additional assets, dollar amounts of assets to be managed, related accounts, account composition, negotiations with clients, etc.).

Expense Ratios

All fees paid to Burrus Financial for investment advisory services are separate and distinct from the fees and expenses charged by mutual funds and/or ETFs to their shareholders. Mutual funds generally charge a management fee for their services as investment managers. These fees and expenses are described in each fund's prospectus. These fees will generally include a management fee, other fund expenses, and a possible distribution fee. The management fee is called an expense ratio. For example, an expense ratio of 0.50 means that the mutual fund company charges 0.5% for their services. If the fund also imposes sales charges, a client may pay an initial or deferred sales charge. A client could invest in a mutual fund directly, without our services. In that case, the client would not receive the services provided by our firm which are designed, among other things, to assist the client in determining which mutual fund or funds are most appropriate to each client's financial conditions and objectives. Accordingly, the client should review both the fees charged by the funds and our fees to fully understand the total amount of fees to be paid by the client and to thereby evaluate the advisory services provided.

Performance figures quoted by mutual fund companies in various publications are generally after their fees have been deducted.

Past Due Accounts and Termination of Agreement

Burrus Financial reserves the right to stop work on any account that is more than 30 days overdue. In addition, Burrus Financial reserves the right to terminate any financial planning engagement where a client has willfully concealed or has refused to provide pertinent information about financial situations when necessary and appropriate, in Burrus Financials judgment, to providing proper financial advice. Any unused portion of fees collected in advance will be refunded.

The initial term of this Agreement shall extend from the date the Investment Advisory Agreement is signed through the end of the Client's first billing period and shall thereafter automatically be extended for additional three-month terms. Either party may terminate the Investment Advisory Agreement by providing the other party with thirty (30) days written notice. Upon termination fees will be prorated to the date of termination and the unearned portion of the fee will be refunded to the client.

If the Client is an individual person, this Agreement shall terminate upon receipt by the Adviser of written notice of the death or mental disability of the Client. Termination of the Agreement shall not, in any case, affect or preclude the consummation of any prior transaction.

Advisory Fees in General

Clients should note that similar advisory services may (or may not) be available from other registered (or unregistered) investment advisers for similar or lower fees.

Limited Prepayment of Fees

Under no circumstances do we require or solicit payment of fees in excess of \$1200 more than six months in advance of services rendered.

Item 6. Performance-Based Fees and Side-By-Side Management

Sharing of Capital Gains

Burrus Financial does not charge performance-based fees and therefore does not participate in side-by-side management.

Item 7. Types of Clients

Description

Burrus Financial generally provides investment advice to individuals, high net worth individuals, corporations, or other small businesses. Client relationships vary in scope and length of service.

Account Minimums

Burrus Financial does not have a minimum account size requirement.

Item 8. Methods of Analysis, Investment Strategies and Risk of Loss

Methods of Analysis

Burrus Financial uses a variety of methods for investment analysis, including fundamental analysis, technical analysis, and cyclical analysis. These methods allow Burrus to assess risk, cash flow, trends, and buy and sell points.

Fundamental Analysis is a method of determining an investment's value based on current and historical data, including the study of financial statements, the economy, and interest rates.

Technical Analysis is a method of investment focusing on the price and volume history of an investment and making investment decisions based on trends.

Cyclical Analysis is a method for determining favorable conditions for buying and selling an investment by analyzing business cycles.

Investment Strategies

The primary investment strategy used on client accounts is strategic asset allocation. This means that we use passively managed index and exchange-traded funds as the core investments, and periodically rebalance the portfolio to maintain a long-term allocation. Portfolios are globally diversified to manage the risks associated with traditional individual markets.

The investment strategy for a specific client is based upon the objectives stated by the client during consultations. The client may change these objectives at any time. It is the client's responsibility to notify Burrus Financial of changes to their objectives or financial situation. An investment strategy is determined for each client based on their unique risk tolerance, goals, and timeframe. Based on their investment strategy, clients are assigned a model portfolio.

Risk of Loss

We make no guarantee of return. All investments are subject to fluctuation in value and principal loss. Clients must be prepared to accept that risk.

Burrus Financial generally uses a long-term investment strategy, however if specific economic or market opportunities arise, short-term investment decisions may be incorporated into the strategy. Frequent trading can increase transaction costs and taxes.

Burrus Financials investment strategy includes investing in domestic and/or international equity and bond markets. We primarily use mutual funds and exchange-traded funds (ETFs). These investments pool underlying investments, which protects clients from dramatic changes in value of an individual investment; however, this strategy still exposes clients to dramatic changes in overall investment markets.

Burrus Financials investment strategy does not include significant or unusual risks aside from those of the general domestic and/or international equity and bond markets.

Item 9. Disciplinary Information

Legal and Disciplinary

Burrus Financial and Jeffrey Bland received an “Administrative Reprimand” from the State of Texas Securities Division for the following; *Respondent Bland violated Section 12.B of the Texas Securities Act by rendering services as an investment adviser representative in Texas for Respondent Burrus at a time when Respondent Bland was not registered with the Securities Commissioner as an investment adviser representative of Respondent Burrus.*

Additional information about Jeffrey B. Bland is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 10. Other Financial Industry Activities and Affiliations

Affiliations

Burrus Financial does not have arrangements that are material to its advisory business or its clients with a broker-dealer, investment company, other investment advisor, financial planning firm, accounting firm, law firm, insurance company or agency, pension consultant, or a real estate broker or dealer.

Jeffrey Bland is also Owner of RBC Partners, Inc. which is a Financial Literacy Company. RBC Partners, Inc. offers the service only of Financial Education to Business Owners and Company Employees. This company provides unbiased adult financial literacy. Jeffrey spends approximately 5% of his time prospecting for new customers, maintaining customer relationships, hiring, and training new instructors.

RBC does not have any relationship material, financial or otherwise, with Burrus Financial.

Item 11. Code of Ethics, Participation or Interest in Client transactions and Personal Trading

Code of Ethics

The employees of Burrus Financial have committed to a Code of Ethics that is available for review by clients and prospective clients upon request.

Our firm's Code of Ethics requires high standards of business conduct, compliance with federal securities laws, reporting and recordkeeping of personal securities transactions and holdings, reviews, and sanctions. Burrus Financial has adopted procedures to implement the firm's policy on personal securities transactions, our Code of Ethics and conducts reviews to monitor and ensure the firm's policy is observed, implemented properly and amended, as appropriate.

We will disclose to advisory clients any material conflict of interest relating to us, our representatives, or any of our employees which could reasonably be expected to impair the rendering of unbiased and objective advice.

Participation or Interest in Client Transactions

Our advisors, as individuals, may own the same widely traded investments we recommend for our Clients. We follow the same advice we provide to our Clients. This situation creates a conflict of interest between us and our clients. We use widely traded mutual funds and exchange-traded funds (ETF's).

These investments are traded in very large volumes every day. Further, we primarily use index funds which contain all the companies found in an underlying index. We acknowledge that this situation creates the potential for a conflict of interest in that an advisor could manipulate his own holdings to the detriment of the Client. However, considering the high trading volumes of the particular individual investments we use with our Clients and the relatively small value of the holdings owned by our advisors, the impact on the markets is minimal. We feel the potential for harm to our Clients is insignificant; however, we continue to be aware of, and monitor, the personal trading of our advisors and employees to assure we have fulfilled our fiduciary duty to our clients.

If employee transactions occur at or around the same time as the clients' transactions, the client will always be given priority over the employee's transactions. Employee accounts are reviewed by management semi-annually for inappropriate activity.

Personal Trading

The Chief Compliance Officer of Burrus Financial is Charles Reimers. He reviews all employee trades. The personal trading reviews ensure that the personal trading of employees does not affect the markets, and that clients of the firm receive preferential treatment. Since most employee trades are small mutual fund trades or exchange-traded fund trades, the trades do not affect the securities markets.

If employee transactions occur around the same time as a client, every effort is made for the employee and client to receive the same price with no priority given to one over the other. Employee accounts are reviewed by management semi-annually for inappropriate activity. No employee of Burrus Financial shall buy or sell securities for their personal portfolio where the decision is substantially derived, in whole or in part, by reason of their employment unless the information is also available to the investing public. No person at Burrus Financial shall prefer his or her own interest to that of the advisory client.

A copy of our Code of Ethics is available to our advisory clients and prospective clients. You may request a copy by email sent to info@burrus.com, or by calling us at (801) 532-0505.

Item 12. Brokerage Practices

Selecting Brokerage Firms

Specific custodians are chosen by Burrus Financial based on the proven integrity and financial responsibility of the firms and the best execution of orders at reasonable commission rates.

Burrus Financial is an independent advisor and has a third-party custody relationship with Fidelity Investments. This allows for qualified independent third-party custody of the client's assets including all transactions and balances. Burrus Financial works with Fidelity Investments due to the administrative convenience and the value they offer our clients. For these reasons, clients are required to use Fidelity Investments as their custodian. In addition, our clients are given the ability to keep up with their investments on a daily basis, if they choose to, by utilizing the custodian's agents and online systems. Burrus Financial does not receive fees or

commissions from any of the arrangements. Clients may contact Burrus Financial to make withdrawal requests.

Burrus Financial will never charge a premium or commission on transactions beyond the actual cost imposed by Fidelity Investments. Burrus Financial receives no “soft dollar” benefits from a broker-dealer or third-party in connection with client securities transactions. Burrus Financial does not accept referrals from broker-dealers.

Burrus Financial does not participate in directed brokerage arrangements. Therefore, Burrus Financial does not direct brokerage transactions. Burrus Financial does not allow clients to direct brokerage transactions.

Order Aggregation

Our firm’s policy is to aggregate client transactions where possible and when advantageous to clients. In these instances, clients participating in any aggregated transactions will receive an average share price and transaction costs will be shared equally and on a pro-rata basis.

Item 13. Review of Accounts

Periodic Reviews

Account reviews may be performed quarterly by advisor Jeffrey B. Bland, Principal in conjunction with calculating the management fees. Account reviews are performed more frequently when market conditions dictate. All clients are encouraged to meet at least once per year with the Advisor to ensure their financial plan aligns with their current financial condition, goals, and objectives.

Review Triggers

Other conditions that may trigger a review are changes in the tax laws, new investment information, and changes in the client’s own situation.

Regular Reports

Account reviewers are instructed to consider the client’s current security positions and the likelihood that the performance of each security will contribute to the investment objectives of the client.

Clients receive periodic communications on at least an annual basis. Investment Advisory Agreement clients may receive written quarterly updates. The written updates may include a net worth statement, portfolio statement and a summary of objectives and progress towards meeting those objectives.

Item 14. Client Referrals and Other Compensation

Incoming Referrals

Burrus Financial has been fortunate to receive many client referrals over the years. The referrals come from current clients, estate planning attorneys, accountants, employees, personal friends of employees and other similar sources. The firm does not compensate referring parties for these referrals.

Outgoing Referrals

It is Burrus Financials policy not to engage solicitors or to pay related or non-related persons for referring potential clients to our firm.

Item 15. Custody

SEC “Custody”

Burrus Financial has constructive custody of client assets due to (i) Burrus’s ability to deduct fees directly from client accounts, and/or (ii) having access to client log in information to help manage outside assets such as 401(k) plans, retirement plans, pension plans etc.

Burrus will not accept physical custody of any client securities or assets. All client assets are held with qualified custodians not affiliated with our firm. We encourage all clients to carefully review custodial statements they receive directly from their broker-dealer, bank, or other custodian, and to compare them with the reports they receive from Burrus on a quarterly basis. If you have any questions on the information provided by your custodian or Burrus, please contact your Burrus Advisor.

Account Statements

All assets are held by qualified custodians, which mean the custodian provides account statements directly to clients at their address of record at least quarterly.

Performance Reports

Clients are urged to compare the values reported in the account statements to those in the quarterly performance reports provided by Burrus Financial.

Item 16. Investment Discretion

Discretionary Authority for Trading

Burrus Financial accepts discretionary authority to manage securities accounts on behalf of clients. Burrus Financial has the authority to determine, without obtaining specific client consent, the securities to be bought or sold.

The client approves the custodian to be used and the commission rates paid to the custodian. Burrus Financial does not receive any portion of the transaction fees or commissions paid by the client to the custodian on certain trades.

Discretionary trading authority facilitates placing trades in your accounts on your behalf so that we may promptly implement the investment policy that you have approved in writing. On rare instances clients can put limits on the discretionary authority granted to Burrus Financial. These requests will be evaluated on a case-by-case basis.

Limited Power of Attorney

A limited power of attorney is a trading authorization for this purpose. You sign a limited power of attorney so that we may execute the trades that you have approved.

Item 17. Voting Client Securities

Proxy Votes

Burrus Financial does not vote proxies on behalf of clients and does not provide advice to clients on how the client should vote. Therefore, although our firm may provide investment advisory services relative to client investment assets, clients maintain exclusive responsibility for: (1) directing the manner in which proxies solicited by issuers of securities beneficially owned by the client shall be voted, and (2) making all elections relative to any mergers, acquisitions, tender

offers, bankruptcy proceedings or other types of events pertaining to the client's investment assets. Clients are responsible for instructing each custodian of the assets, to forward to the client copies of all proxies and shareholder communications relating to the client's investment assets.

We do not offer any consulting assistance regarding proxy issues to clients.

Clients will receive proxies directly from their Custodian for Fund Company.

Item 18. Financial Information

Financial Condition

Burrus Financial does not have any financial impairment that will preclude the firm from meeting contractual commitments to clients. A balance sheet is not required to be provided because Burrus Financial does not require prepayment of fees of more than \$500 per client, and six months or more in advance.

Burrus Financial has never been the subject of a bankruptcy petition.

Discretionary Authority

As we hold discretionary authority to manage securities in certain client accounts we are required to disclose any financial conditions that may impair our ability to meet contractual commitments to our clients.

We do not have any financial conditions which might impair our ability to meet our contractual commitments.

Prepayment of Client Fees

Under no circumstances do we require or solicit payment of fees in excess of \$1,200 per client more than six months in advance of services rendered.

Additional Information

Business Continuity Plan

Burrus Financial Services, Inc. has a Business Continuity Plan in place that provides detailed steps to mitigate and recover from the loss of office space, communications, services, or key people.

Disasters

The Business Continuity Plan covers natural disasters such as snowstorms, hurricanes, tornados, and flooding. The Plan covers man-made disasters such as loss of electrical power, loss of water pressure, fire, bomb threat, nuclear emergency, chemical event, biological event, T-1 communications line outages, internet outage, railway accident and aircraft accident. Electronic files are backed up daily and archived offsite.

Alternate Offices

Alternate offices are identified to support ongoing operations in the event the main office is unavailable. It is our intention to contact all clients within five days of a disaster that dictates moving our office to an alternate location.

Information Security

Burrus Financial Securities, Inc. maintains an information security program to reduce the risk that your personal and confidential information may be breached.

Privacy Notice

Burrus Financial is committed to maintaining the confidentiality, integrity and security of the personal information that is entrusted to us.

The categories of nonpublic information that we collect from you may include information about your personal finances, information about your health to the extent that is needed for the financial planning process, information about transactions between you and third parties, and information from consumer reporting agencies, e.g., credit reports. We use this information to help you meet your personal financial goals.

With your permission, we disclose limited information to attorneys, accountants, and mortgage lenders with whom you have established a relationship. You may opt out from our sharing information with these nonaffiliated third parties by notifying us at any time by telephone, mail, fax, email or in person. With your permission, we share a limited amount of information about you with your brokerage firm in order to execute securities transactions on your behalf.

We maintain a secure office to ensure that your information is not placed at unreasonable risk. We employ a firewall barrier, secure data encryption techniques and authentication procedures in our computer environment.

We do not provide your personal information to mailing list vendors or solicitors. We require strict confidentiality in our agreements with unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors. Federal and state securities regulators may review our Company records and your personal records as permitted by law.

Personally, identifiable information about you will be maintained while you are a client, and for the required period thereafter that records are required to be maintained by federal and state securities laws. After that time, information may be destroyed.

We will notify you in advance if our privacy policy is expected to change. We are required by law to deliver this *Privacy Notice* to you annually, in writing.



Firm Brochure Supplement
(Part 2B of Form ADV)

Jeffrey B. Bland, Principal CRD #4365908
Daniel J. Hannon, IAR CRD #6170720
Charles W. Reimers, IAR, CCO CRD #6441386

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This brochure supplement provides information about Jeffrey B. Bland, Daniel J. Hannon, and Charles W. Reimers that supplements Burrus Financial Services, Inc. brochure. You should have received a copy of that brochure. Please contact Burrus Financial Services if you did not receive Burrus Financials brochure or if you have any questions about the contents of this supplement.

Additional information about Jeffrey B. Bland, Daniel J. Hannon, and Charles W. Reimers is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2**Jeffrey Burrus Bland, Principal****Year of Birth: 1977*****Educational Background:***

- University of Montana, Missoula, MT; B.A. Liberal Science, 2000
- Cannon Financial Business School, Salt Lake City, Utah; CEPP, 2002
- Westminster Graduate School, Salt Lake City, Utah; MBA Coursework, 2005-2007, pending
- Series 65 – Uniform Investment Advisor Exam

Business Experience:

- July 2007 – Present: Investment Advisory Rep., Burrus Financial Services, Inc. SLC, UT

Item 3***Disciplinary Information:***

Jeffrey Bland received an “Administrative Reprimand” from the State of Texas Securities Division on September 23, 2011.

Item 4***Other Business Activities:***

Jeffrey Bland is also Owner of RBC Partners, Inc. which is a Financial Literacy Company. RBC Partners, Inc. offers the service only of Financial Education to Business Owners and Company Employees. This company provides unbiased adult financial literacy. Jeffrey spends approximately 5% of his time prospecting for new customers, maintaining customer relationships, hiring and training new instructors.

RBC does not have any relationship material, financial or otherwise with Burrus Financial Services

Item 5***Additional Compensation:***

Jeffrey does not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly.

Item 6***Supervision***

The activities of Jeff Bland are supervised by Charlie Reimers, CCO and can be reached at (801) 532-0505. All clients receive confirmation, from the brokerage holding their account(s), of any and all trades made by Jeff Bland, on their behalf. In addition to trade confirmations, each client receives quarterly account statements from the brokerage that holds their account(s). Jeff Bland reviews the holdings in each client account for appropriateness (client goals and holdings) at the end of each calendar quarter.

Item 2**Daniel Joseph Hannon, IAR****Year of Birth: 1975*****Educational Background:***

- B.S. Geography, Brigham Young University, 2003
- Minor, Business Management, Brigham Young University, 2003
- Minor, Manufacturing, Brigham Young University, 2003
- Master of Public Administration, University of Utah, 2006
- Series 65 – Uniform Investment Advisor Exam

Business Experience:

- October 2012 – Present: Investment Advisor Rep., Burrus Financial Services, Inc. SLC, UT
- October 2011 – October 2012: Project Manager, K'nowbe Works SLC, UT
- August 2011 – October 2011: Teacher, Challenger School SLC, UT

Item 3***Disciplinary Information:***

There has been no disciplinary information reported for Daniel J. Hannon.

Item 4***Other Business Activities:***

Daniel J. Hannon is a private investor in ERGOROLLER, LLC. This company sells ergonomic wrist massagers online only. Daniel Hannon spends approximately 1% of his time working on the website for this company.

ERGOROLLER, LLC does not have any relationship, material, financial or otherwise with Burrus Financial Services.

Item 5***Additional Compensation:***

Daniel does not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly.

Item 6***Supervision***

The activities of Daniel Hannon are supervised by Jeff Bland, Principal, and can be reached at (801) 532-0505. All clients receive confirmation, from the brokerage holding their account(s), of any and all trades made by Daniel Hannon, on their behalf. In addition to trade confirmations, each client receives quarterly account statements from the brokerage that holds their account(s). Jeff Bland reviews the holdings in each client account for appropriateness (client goals and holdings) at the end of each calendar quarter.

Educational Background:

- Frostburg State University, Frostburg MD; B.A. Business Concentrated in Finance, 2009
- Series 66 – Uniform Investment Advisor Exam
- SIE - Securities Industry Essentials Exam

Business Experience:

- October 2018 – Present: Investment Advisor Rep., Burrus Financial Services, Inc. SLC UT
- March 2018 – October 2018: Unemployed, Silverthorne CO
- November 2015 – March 2018: Investment Consultant, Scottrade, Newport News VA
- January 2014 – November 2015: Product Specialist, Janus Funds, Denver CO
- January 2010 – January 2014: E5, US Navy, Norfolk VA
- June 2009 – January 2010: First Mate, Firelight Yacht Services, LLC., Washington DC
- September 2005 – May 2009: Student, Frostburg State University, Frostburg MD

Item 3

Disciplinary Information:

There has been no disciplinary information reported for Charles W. Reimers.

Item 4

Other Business Activities:

Charles W. Reimers has no other business activities.

Item 5

Additional Compensation:

Charles does not receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly.

Item 6

Supervision

The activities of Charles Reimers are supervised by Jeff Bland, Principal, and can be reached at (801) 532-0505. All clients receive confirmation, from the brokerage holding their account(s), of any and all trades made by Charles Reimers, on their behalf. In addition to trade confirmations, each client receives quarterly account statements from the brokerage that holds their account(s). Jeff Bland reviews the holdings in each client account for appropriateness (client goals and holdings) at the end of each calendar quarter.