

Item 1: Cover Page

Birch Financial Group, LLC

149 Emerald St, Suite M2/M3
Keene, NH 03431
(603) 338-3838

Form ADV Part 2B – Brochure Supplement

Dated: October 17, 2024

For

Travis Poodiack, CFP®

Manager, Chief Compliance Officer, and Investment Adviser Representative

This brochure supplement provides information about Travis Poodiack that supplements the Birch Financial Group, LLC (“BFG”) brochure. You should have received a copy of that brochure. Please contact Travis Poodiack if you did not receive BFG’s brochure or if you have any questions about the contents of this supplement.

Additional information about Travis Poodiack is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 6527796.

Item 2: Educational Background and Business Experience

Travis Poodiack, CFP®

Year of Birth: 1992

Educational Background

- University of New Hampshire, Bachelor's Degree, Business Administration/Finance, 2015

Business Experience

- 06/2024 – Present, Birch Financial Group, LLC, Manager/IAR/CCO
- 05/2022 – 10/2024, Steward Partners Investment Solutions, LLC, Registered Representative
- 11/2016 – 10/2024, Steward Partners Global Advisory, LLC, Wealth Advisor
- 11/2016 – 05/2022, Raymond James Financial Services, Inc., Registered Associate

Professional Designation(s)

CFP® (Certified Financial Planner):

Travis Poodiack is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, Travis Poodiack may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and Travis Poodiack may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirements through other qualifying credentials.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3: Disciplinary Information

Travis Poodiack has never been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Travis Poodiack is currently a licensed insurance agent, however, he no longer sells any insurance products, and is not affiliated with any insurance companies. Travis Poodiack will not sell any insurance products to clients or prospective clients of BFG.

Item 5: Additional Compensation

Travis Poodiack does not receive any economic benefit from any person, company, or organization, in exchange for providing Clients advisory services through BFG.

Item 6: Supervision

Travis Poodiack is a Manager, the Chief Compliance Officer, and an Investment Adviser Representative of BFG. In this role, Mr. Poodiack supervises the advisory activities of BFG and implementation of the firm's compliance program. Mr. Poodiack is bound by and will adhere to the firm's policies and procedures and Code of Ethics. Clients may contact Mr. Poodiack by calling the phone number listed on the cover page of this brochure supplement.

Liana Poodiack, Manager of BFG, supervises Mr. Poodiack's trading activities. Ms. Poodiack can be reached by calling the phone number listed on the cover page of this brochure supplement.

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Dated: October 17, 2024

For

Liana Poodiack, CFP®

Manager and Investment Adviser Representative

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Additional information about Liana Poodiack is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 3230074.

Item 2: Educational Background and Business Experience

Liana Poodiack, CFP®

Year of Birth: 1968

Educational Background

- Rivier College, Associates Degree, Accounting, 1989
- Franklin Pierce College, Bachelor's Degree, Accounting, 1996

Business Experience

- 06/2024 – Present, Birch Financial Group, LLC, Manager/IAR
- 05/2022 – 10/2024, Steward Partners Investment Solutions, LLC, Registered Representative
- 11/2016 – 10/2024, Steward Partners Global Advisory, LLC, Wealth Advisor
- 11/2016 – 10/2024, Steward Partners Investment Advisory, LLC, IAR
- 11/2016 – 05/2022, Raymond James Financial Services, Inc., Financial Advisor

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Item 6: Supervision

Travis Poodiack, Manager and Chief Compliance Officer, supervises Ms. Poodiack's advisory activities. Mr. Poodiack can be reached by calling the phone number listed on the cover page of this brochure supplement.