

**Item 1: Cover Page for Part 2B of Form ADV:  
Brochure Supplement  
April 30, 2024**



**JERRY J. BROUSSARD**

**Broussard Financial Group, LLC  
106 W Veterans Memorial Drive  
Kaplan, LA 70548  
(337) 643-8319**

**Firm Contact:  
Jerry J. Broussard, Chief Compliance Officer**

**Firm Website Address:  
[www.broussardfinancialgroup.com](http://www.broussardfinancialgroup.com)**

This Brochure Supplement provides information about Jerry Broussard that supplements our ADV Part 2A Brochure. You should have received a copy of that Brochure. Please contact us if you did not receive Broussard Financial Group LLC's Brochure or if you have any questions about the contents of this Brochure Supplement.

Additional information about Jerry Broussard is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD#: 1230207.

## Item 2: Educational Background & Business Experience

### Jerry J. Broussard

**Year of Birth:** 1960

**Educational Background:** University of Southwestern Louisiana, 1982- B.S.B.A. in Finance

### **Business Background:**

- Broussard Financial Group, LLC, 10/2002 to Present, President
- New York Life Insurance Company, 05/1982 to 10/2002, Agent, Registered Representative

### **Professional Designation:**

Mr. Broussard is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he 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](http://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 requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- **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**

Mr. Broussard does not have disciplinary events to disclose.

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

Mr. Broussard is not actively engaged in any other investment-related business or occupations business outside of Broussard Financial Group, LLC, nor is he actively engaged in any non-investment related business or occupation for compensation.

### **Item 5: Additional Compensation**

Mr. Broussard does not receive any additional economic benefits for advisory services. However, as an owner of Broussard Financial Group, LLC, his compensation is indirectly contingent upon the on the number of clients he and other representatives refer to the firm, the performance of client accounts, and the addition of investment assets to current client accounts.

### **Item 6: Supervision**

Broussard Financial Group, LLC provides investment advisory and supervisory services in accordance with Broussard Financial Group, LLC's policies and procedures manual. The primary purpose of Broussard Financial Group, LLC's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). Broussard Financial Group, LLC's Chief Compliance Officer, Jerry Broussard, is primarily responsible for the implementation of Broussard Financial Group, LLC's policies and procedures and overseeing the activities of Broussard Financial Group, LLC's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of Broussard Financial Group, LLC have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding Broussard Financial Group, LLC's supervision or compliance practices, please contact Mr. Broussard at (337) 643-8319.