

SwitchPoint Financial Planning, LLC

## Form ADV Part 2B – Brochure Supplement

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*For*

**Kyle David Wilhelm**

Dated March 15, 2024

This brochure supplement provides information about Kyle Wilhelm that supplements the SwitchPoint Financial Planning, LLC (“SwitchPoint”) brochure. A copy of that brochure precedes this supplement. Please contact Kyle Wilhelm if the SwitchPoint brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Kyle Wilhelm is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

# Item 2: Educational Background and Business Experience

## **Kyle David Wilhelm**

Born: 1988

### **Educational Background**

- 2010 – Bachelor of Business Administration: Finance, Western Michigan University

### **Business Experience**

- 9/2021 – Present, SwitchPoint Financial Planning, CCO & Operations Manager
- 11/2020 – 8/2021, Integris Wealth Management, Operations Manager
- 1/2018 – 11/2020, Rock House Financial, CCO & Director of Operations
- 4/2015 – 12/2017, Rock House Financial, Analyst
- 8/2012 – 4/2015, Knox Capital Group, Analyst

### **Professional Designations, Licensing & Exams**

- FINRA Series 65

# Item 3: Disciplinary Information

No management person at SwitchPoint has ever 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

Kyle Wilhelm is not involved with outside business activities.

# Item 5: Additional Compensation

Kyle Wilhelm does not receive any economic benefit from any person, company, or organization, in exchange for providing Clients advisory services through SwitchPoint.

# Item 6: Supervision

Kyle Wilhelm, as Chief Compliance Officer of SwitchPoint, is responsible for supervision. They may be contacted at the phone number on this brochure supplement.