

This brochure supplement provides information about Kelly Leigh Olczak that supplements the Lynn Leigh & Company, LLC brochure. You should have received a copy of that brochure. Please contact Kelly Leigh Olczak if you did not receive Lynn Leigh & Company, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Kelly Leigh Olczak is also available on the SEC's website at www.adviserinfo.sec.gov.

LynnLeigh & Company, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Kelly Leigh Olczak
Personal CRD Number: 5039125
Investment Adviser Representative

Lynn Leigh & Company, LLC
1160 Pittsford Victor Road Suite A
Pittsford, NY 14534
(585) 623-5982
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www.lynnleighco.com

UPDATED: 03/28/2024

Item 2: Educational Background and Business Experience

Name: Kelly Leigh Olczak

Born: 1966

Educational Background and Professional Designations:

Education:

BA Psychology, SUNY Geneseo - 1994

Designations:

CFP® - Certified Financial Planner

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- ii. Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business Background:

05/2018 – Present	Investment Adviser Representative Lynn Leigh & Company, LLC
05/2016 – 05/2018	Private Wealth Manager Cornerstone Wealth Management
09/2005 - 05/2016	Financial Advisor Edward Jones

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Insurance Agency Affiliations

Ms. Olczak is also a licensed insurance professional. Implementations of insurance recommendations are separate and apart Mrs. Olczak's role with LynnLeigh & Company. As an insurance professional, Ms. Olczak may receive customary commissions and other related revenues from the various insurance companies whose products are sold. Ms. Olczak is not required to offer the products of any particular insurance company.

Commissions generated by insurance sales do not offset regular advisory fees. This may cause a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Ms. Olczak or the Advisor.

Item 5: Additional Compensation

As disclosed in Form ADV Part 2A Item 5 – Fees and Compensation, there is no investment related outside business activities to report. There are no additional businesses or occupations to report that provide a substantial source of income or require a substantial amount of time.

Item 6: Supervision

As a representative of Lynn Leigh & Company, LLC, Kelly Leigh Olczak is supervised by Rebecca Gillette, the firm's Chief Compliance Officer. The phone number for Rebecca L Gillette is (585) 623-5970.

LynnLeigh & Company maintains a Code of Ethics to which all supervised persons must subscribe. The Code of Ethics provides for the firm and its supervised persons to exercise their fiduciary duty to clients by acting in the best interest of the client and always placing the client's interests first and foremost. LynnLeigh & Company takes seriously its compliance and regulatory obligations and requires all supervised persons to comply with applicable federal and state rules and regulations, as well as the firm's policies and procedures.

LYNNLEIGH & COMPANY

RELIABLE GUIDANCE • FINANCIAL WELL-BEING • BOLDLY TRANSPARENT

1160A Pittsford Victor Road
Pittsford, NY 14534
(585) 623-5970

PRIVACY POLICY

Investment advisers are required by law to inform their clients of their policies regarding privacy of client information. We are bound by professional standards of confidentiality that are even more stringent than those required by law. Federal law gives the customer the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share, and protect your personal information.

TYPES OF NONPUBLIC PERSONAL INFORMATION (NPI) WE COLLECT

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This can include but is not limited to your Social Security Number, Date of Birth, Banking Information, Financial Account Numbers and/or Balances, Sources of Income, and Credit Card Numbers or Information. When you are no longer our customer, we may continue to share your information only as described in this notice.

PARTIES TO WHOM WE DISCLOSE INFORMATION

All Investment Advisers may need to share personal information to run their everyday business. In the section below, we list the reasons that we may share your personal information:

- For everyday business purposes – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus;
- For our marketing – to offer our products and services to you;
- For joint marketing with other financial companies;
- For our affiliates' everyday business purposes – information about your transactions and experiences and information about your creditworthiness; or
- For affiliates and non-affiliates to market to you.

If you are a new customer we may begin sharing your information on the day you sign our agreement. When you are no longer our customer, we may continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.

PROTECTING THE CONFIDENTIALITY OF CURRENT AND FORMER CLIENT'S INFORMATION

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards and secured files and building.

FEDERAL LAW GIVES YOU THE RIGHT TO LIMIT SHARING - OPTING OUT

Federal law allows you the right to limit the sharing of your NPI by "opting-out" of the following: sharing for non-affiliates' everyday business purposes – information about your creditworthiness; or sharing with affiliates or non-affiliates who use your information to market to you. State laws and individual companies may give you additional rights to limit sharing. Please notify us immediately if you choose to opt out of these types of sharing.

DEFINITIONS: Affiliates – companies related by common ownership or control. They can be financial and non-financial companies; Non-affiliates – companies not related by common ownership or control. They can be financial and non-financial companies; Joint marketing – a formal agreement between non-affiliated financial companies that together market financial products or services to you.

Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

Updated: 11_12_2018