

SUPERVISED PERSON BROCHURE

FORM ADV PART 2B

Dixie Lee Munsee



STRATEGIC
PLANNING GROUP

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This brochure supplement provides information about Dixie Munsee and supplements the Strategic Planning Group's brochure. You should have received a copy of that brochure. Please contact Dixie Munsee if you did not receive the brochure or if you have any questions about the contents of this supplement.

Additional information about Dixie Munsee (CRD#4614122) is available on the SEC's website at www.adviserinfo.sec.gov.

MARCH 1, 2016

Brochure Supplement (Part 2B of Form ADV)
Supervised Person Brochure

Principal Executive Officer
Dixie Lee Munsee

Year of birth: 1957

Item 2 Educational Background and Business Experience

Business Experience:

- Strategic Planning Group; Investment Advisor Representative; 01/2016 – Present
- Cambridge Investment Research Advisors, Inc.; Investment Advisor Representative; 06/2014 – Present
- Cambridge Investment Research, Inc.; Registered Representative; 05/2014 – Present
- Rocky Mountain Truck Parts LLC; Book Keeper; 11/2009 – Present
- Munsee Enterprises LLC; Book Keeper; 07/2009 – Present
- Financial Insight & Tactics; Insurance Agent; 04/2005 – Present
- Girard Securities, Inc.; Registered Representative; 10/2011 – 05/2014
- Girard Securities, Inc.; Investment Advisor Representative; 09/2011 – 06/2014
- United Planners' Financial Services of America, A Limited Liability Company; Investment Advisor Representative/Registered Representative; 05/2008 – 07/2009
- Bob Aamodt, Inc.; Associate; 04/2008 – 07/2009
- Raymond James Financial Resources; Investment Advisor Representative; 04/2005 – 05/2008
- Raymond James Financial Resources; Registered Representative; 03/2005 – 05/2008

Educational Background:

- Brigham Young University; Youth Leadership; 12/1977
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Item 3 Disciplinary Information

Criminal or Civil Action: None to report.

Administrative Proceeding: None to report.

Self-Regulatory Proceeding: None to report.

Item 4 Other Business Activities

Dixie Munsee has a financial industry affiliated business as an insurance agent. From time to time, she may offer clients advice or products from this activity.

Dixie Munsee is also a registered representative with Cambridge Investment Research, Inc., member FINRA/SIPC. From time to time, she may offer clients advice or products from this activity.

Dixie Munsee is also an investment advisor representative with Cambridge Investment Research Advisors, Inc. From time to time, she may offer clients advice or products from this activity.

These practices represent conflicts of interest because it gives Ms. Munsee an incentive to recommend products based on the commission/fee amount received. This conflict is mitigated by the fact that Ms. Munsee has a fiduciary responsibility to place the best interest of the client first and the clients are not required to purchase any products. Clients have the option to purchase these products through another insurance agent, registered representative and/or investment advisor representative of their choosing.

In addition, Ms. Munsee is a book keeper for Munsee Enterprises LLC and Rocky Mountain Truck Parts LLC. This relationship creates no conflict of interest at clients of Strategic Planning Group will not be solicited for services offered by Capital Concepts Financial Services, Inc. and vice versa.

Item 5 Additional Compensation

Dixie Munsee receives additional compensation in her capacity in her additional roles, but she does not receive any performance based fees.

Item 6 Supervision

As Chief Compliance Officer of Strategic Planning Group, Dixie Munsee is ultimately responsible for all supervision and formulation and monitoring of investment advice offered to clients. She will adhere to policies and procedures set forth in the Compliance Manual.

Item 7 Requirements for State-Registered Advisors

Arbitration Claims: None

Self-Regulatory Organization or Administrative Proceeding: None

Bankruptcy Petition: None