

Item 1: Cover Page



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September 30, 2011

FORM ADV PART 2A
FIRM BROCHURE

This brochure provides information about the qualifications and business practices of Storey & Associates. If you have any questions about the contents of this brochure, please contact us at 330-526-8944. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Storey & Associates is available on the SEC's website at www.adviserinfo.sec.gov.

Storey & Associates is a Registered Investment Adviser. Registration with the United States Securities and Exchange Commission or any state securities authority does not imply a certain level of skill or training.

Item 2: Material Changes

Our most recent brochure, dated September 30, 2010, has been updated to comply with the new Securities and Exchange Commission requirements for reporting. As such, this brochure, dated September 30, 2011, is a new document that is materially different in format from our prior brochure.

In the future, this item will only discuss specific material changes that are made to the brochure and provide clients with a summary of each change.

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Item 4: Advisory Business

Storey & Associates is a privately owned Ohio corporation that provides fee-only, comprehensive financial planning and investment advisory services to individuals, couples, families, trusts, estates, corporations, and other business entities. The firm, founded in 2009, is owned 100% by Harlan G. Storey.

Financial Planning Services

Storey & Associates provides comprehensive financial planning services to individuals and their families. Specific areas that may be addressed by our financial planning services include, but are not limited to, retirement, tax, risk management (insurance), investment, cash flow, college savings, and estate planning. Each plan is developed based on the client's unique circumstances.

Our planning services begin by gathering all personal and financial data and establishing the client's goals and objectives. The data is processed and analyzed and a written plan is developed to assist the client as they work towards their goals and objectives. The written plan may include specific recommendations for each area of planning covered and, where applicable, multiple retirement plan scenarios for a client to review.

Clients that engage us for financial planning services are required to sign a letter of agreement, outlining the scope of the engagement. In many cases, a client will engage us to first go through the financial planning process before hiring us for investment advisory services.

Investment Advisory Services

If a client completes the financial planning process and, at that time, elects to hire us for investment advisory services, we typically agree to a new flat fee, as outlined in a letter of agreement, depending on the complexity of the ongoing planning and investment advisory services. We manage assets on a discretionary basis and this service provides investment analysis, allocation, account updates, and monitoring of the client's portfolio, as well as quarterly or more frequent reporting of investment performance.

Clients that engage us to only perform ongoing investment advisory services will also sign a letter of agreement; however, the agreed upon fee will not include any planning services that may be required in the future. A new agreement would be signed should planning be required. In these cases, we still manage assets on a discretionary basis and this service also provides investment analysis, allocation, account updates, and monitoring of the client's portfolio, as well as quarterly or more frequent reporting of investment performance.

For discretionary accounts, the client grants us limited trading authority in their account by signing appropriate documents with the respective custodian, or by signing our Discretionary Authority Agreement. This authority allows us to enter securities transactions on the client's behalf, determining which securities and the amount of securities to buy or sell. The client is notified of all transactions by trade confirmations from their custodian.

If a client wishes us to manage a retirement plan, or any other account held outside of Charles Schwab, they will be required to sign a discretionary authority agreement. The discretionary authority agreement grants us authority to:

1. Buy and sell available securities within the account(s)
2. Obtain account valuations and other information as often as necessary

It does not give us power to execute withdrawals or change beneficiary designations on the accounts.

For non-discretionary accounts, the client is ultimately responsible for determining which securities and the amount of securities to buy or sell. We may provide recommendations for these accounts, however, it is the responsibility of the client to execute trades.

As of August 31, 2011, discretionary assets under management were \$128,600,000.

As of August 31, 2011, non-discretionary assets under management were \$40,000.

Item 5: Fees and Compensation

Financial Planning Only Fees

Storey & Associates charges a flat fee for financial planning services, typically ranging from \$1,500 to \$5,000. This fee is negotiable, depending on the complexity of the services required. Financial planning may include, but is not limited to, retirement, tax, risk management (insurance), investment, cash flow, college savings, and estate planning. Initial financial planning only agreements are valid for one year from the first billing period.

Financial planning fees are billed quarterly in advance and typically do not begin until the quarter following the quarter the plan was delivered. In this case, delivery consists of Storey & Associates providing a written plan to the client. For example, if a client engages us in July and receives their written plan in August, they would receive an invoice for one-fourth of the agreed upon fee October 1st with one-fourth (¼) invoiced each quarter thereafter for the remaining three quarters. Payment is expected within thirty days of the invoice date.

Investment Advisory and Financial Planning Fees

For clients that engage us for ongoing financial planning and investment advisory services, we also charge a flat fee. This fee is negotiable, depending on the complexity of the services required, but our general fee schedule is as follows:

Assets Under Advisement (AUA)*	Quarterly	Annually
\$0-\$250,000	\$625	\$2,500
\$250,001-\$500,000	\$1,250	\$5,000
\$500,001-\$750,000	\$1,875	\$7,500
\$750,001-\$1,000,000	\$2,500	\$10,000

*AUA includes investment accounts, 401(k)s, 403(b)s, stock options, etc.

For each additional \$250,000 of AUA from \$1,000,000 to \$5,000,000 the fee will be an additional \$250 per quarter (\$1,000 annually). For each additional \$500,000 of AUA over \$5,000,000 the fee will be an additional \$250 per quarter (\$1,000 annually).

These above fees are based on the AUA at the time of the engagement, and ongoing financial planning and investment advisory agreements are valid for 3 years. Fees may be adjusted at the end of three years, and every three years thereafter. This agreement may be cancelled by either party at any time without restriction.

Fees for ongoing investment advisory and financial planning services are billed quarterly in advance. The flat fee is generally deducted directly from the client's investment account, provided enough assets are held at Charles Schwab Institutional or another qualified custodian. Alternatively, the client may choose to receive an invoice for the quarterly fee. In such cases, payment of the fee is expected within 30 days of the invoice date.

Investment Advisory Only Fees

For clients that engage us for ongoing investment advisory services only, our fee is as follows:

Assets Under Advisement (AUA)*	Quarterly	Annually
First \$500,000	.2250%	.90%
Next \$500,000	.1250%	.50%
Next \$1,000,000	.0750%	.30%
Next \$8,000,000	.0625%	.25%
Assets over \$10,000,000	.0375%	.15%

*AUA includes investment accounts, 401(k)s, 403(b)s, stock options, etc.

Fees for ongoing investment advisory and financial planning services are billed quarterly in advance. Fees are generally deducted directly from the client's investment account, provided enough assets are held at Charles Schwab Institutional or another

qualified custodian. Alternatively, the client may choose to receive an invoice for the quarterly fee. In such cases, payment of the fee is expected within 30 days of the invoice date.

Investment Advisory Only quarterly fees are calculated based on the value of the assets as of the last day of the previous quarter. This agreement may be cancelled by either party at any time without restriction.

General Information

When a fee is deducted from a client's account, the client must provide Charles Schwab Institutional or other qualified custodian with previous written authorization to have fees deducted from their account and paid to Storey & Associates. However, this authorization does not give Storey & Associates authority to deduct other monies from client account(s), except to request that Charles Schwab Institutional or other qualified custodian disburse funds directly to the client or client agents upon specific instructions. Charles Schwab Institutional or other qualified custodians will provide client statements at least quarterly showing all disbursements from the account, including the amount of the advisory fee, if deducted directly from the account.

All fees deducted from a client account are paid from the cash or money market balance. If the account does not have a sufficient cash or money market balance to cover the fees, Storey & Associates may sell holdings as necessary to pay them, which could incur transaction costs and/or create tax consequences for the client.

Storey & Associates reserves the right to modify fee schedules at our discretion, subject to notification in accordance with applicable laws and regulations. Fees in excess of \$1,200 are never collected more than six months in advance of services rendered.

Item 12, Brokerage Practices, further describes the factors that Storey & Associates considers in selecting or recommending broker-dealers for client transactions and determining the reasonableness of their compensation.

Either the client or Storey & Associates may terminate an agreement for financial planning or investment advisory services at any time. Termination will be considered effectively immediately upon receipt or delivery of written notification from or to the client. In the event a client transfers all investment accounts to a new investment advisor and does not notify us, termination will be deemed to occur the day the transfer is complete. When termination occurs during the middle of a quarter, a pro-rated portion of the quarterly fee shall be refunded to the client.

Brokerage commissions, transaction ticket fees, and other related costs and expenses imposed by custodians, brokers, and other third parties, such as fees charged by fund managers, custodial fees, deferred sales charges, transfer fees, wire transfer and electronic fund fees, and all other fees are billed directly to the client. Such charges,

fees, and commissions are exclusive of and in addition to Storey & Associates' fee, and we will not receive any portion of these commissions, fees, and costs. Clients are encouraged to review each fund's prospectus for details regarding the expenses associated with investing in that fund. A client could invest in the funds directly without the services provided by Storey & Associates. In this case, the client would not receive the advice and services provided by Storey & Associates, which are designed, among other things, to assist the client in determining which funds are most appropriate to their financial situation and objectives. Some funds also may not be available to the retail client directly. Accordingly, the client should review both the fees charged by Storey & Associates and the fees charged by the broker, custodian, and/or funds to fully understand the total amount of fees to be paid.

Neither Storey & Associates, nor the client, may assign a letter of agreement without the prior consent of the other party.

A copy of Storey & Associates' brochure shall be provided to each client prior to or at the same time the letter of agreement is executed.

Item 6: Performance-Based Fees and Side-By-Side Management

Storey & Associates does not have performance-based account arrangements. Not using performance incentives allows us to provide more unbiased advice as we do not favor one client account over another, nor do we assume more risk than a client wishes to take.

Item 7: Types of Clients

Our services are offered to individuals, couples, families, trusts, estates, corporations, and other business entities. We do not have any minimums for opening or maintaining an account.

Item 8: Methods of Analysis, Investment Strategies and Risk of Loss

As previously mentioned, Storey & Associates clients typically engage us for financial planning services prior to us providing discretionary investment management. We believe the financial planning process is the best way for us to get to know our clients and their need for risk before formulating investment advice. Our planning process begins by gathering all personal and financial data and establishing the client's goals and objectives. The data is processed and analyzed and a written plan is developed to assist the client as they work towards their goals and objectives. Investment recommendations are part of this plan. Asset allocation recommendations are made in our best judgment to help the client achieve his or her overall financial objectives while minimizing risk exposure.

If a client does not wish to engage us for financial planning services, and instead only wishes us to manage his or her investments, a risk tolerance questionnaire must be completed. This risk tolerance questionnaire helps us evaluate our clients' knowledge of investments and how market risk affects the value of investments, as well as how risk can lead to losses. Despite not engaging us for financial planning, we also request some financial information regarding income, pensions, outside investment accounts, retirement plans, other assets, expected inheritance, anticipated employment changes, liabilities, desired standard of living, etc. Knowing information regarding these items helps us determine how much risk a client needs to take so that we can provide an overall asset allocation recommendation.

Regardless of the service we are engaged to provide, investing in securities involves risk of loss that clients should be prepared to bear.

Storey & Associates may use the following methods of analysis in formulating investment advice and/or managing client assets:

- **Asset Allocation:** In addition to focusing on security selection, we attempt to identify and invest the portfolio in an appropriate mix of different asset classes (stocks, bonds, cash, etc.) or investment strategies based on the client's objectives. The purpose of asset allocation is to seek to improve overall portfolio performance or reduce volatility by diversifying the client's investments consistent with the client's investment objectives and risk tolerance.

A risk of asset allocation is that the client may participate only to a limited extent in sharp increases in a particular security, industry or market sector, because portfolio diversification necessarily limits the portion of the client's account invested in a single security, industry or market sector. Another risk is that the ratio of securities allocated to specific asset classes or investment strategies may change over time due to market movements and, if not corrected, may no longer be appropriate for the client's goals. To seek to mitigate this risk, we monitor the allocation among asset types as valuations fluctuate in the market and periodically readjust the allocations to the intended levels. This monitoring and adjustment is typically called portfolio rebalancing.

- **Fundamental Analysis:** Typically involves analysis of financial statements, the general financial health of companies, and/or the analysis of management or competitive advantages.
- **Technical Analysis:** Involves analyzing past market movements and applying that analysis to the present in an attempt to recognize recurring patterns of investor behavior and potentially predict future price movement.

- Cyclical Analysis: Involves the analysis of business cycles to find favorable conditions for buying and/or selling a security.

Storey & Associates also utilizes financial newspapers, magazines, and research materials provided by other financial institutions (e.g. Charles Schwab Institutional) to assist in making security selection decisions. In addition, two pieces of software we use are Morningstar® Advisor Workstation and Fi360™. These software programs are used to evaluate specific due diligence criteria including, but not limited to a fund's management style, style consistency, expense ratios, risk-adjusted returns, and historical returns.

Storey & Associates primarily utilizes investment company products. Assets are primarily invested in no-load mutual funds, and exchange-traded funds, through our custodial arrangement. Our custodial relationship with Schwab enables us to obtain many no-load mutual funds without transaction charges and other no-load and load waived funds at nominal transaction charges as well as access to many institutional funds. Although most trades are mutual funds or exchange-traded funds where trade aggregation does not provide any client benefit, when funds do allow aggregation for purposes of qualifying to purchase institutional shares, our clients do benefit by having access to institutional shares that have significantly lower expense ratios than the retail versions of the same funds. Stock and bonds may be purchased or sold through a custodial account when appropriate.

Item 9: Disciplinary Information

Neither Storey & Associates nor its owner or any associates have ever been the subject of any legal or disciplinary events material to our business.

Item 10: Other Financial Industry Activities and Affiliations

Harlan G. Storey, in his separate individual capacity, is licensed to engage in the practice of law. His legal practice is not material to Storey & Associates investment advisory business or other services. His services are not available to the general public and, unless he has been separately engaged by any Storey & Associates client to provide legal services, absolutely no corresponding attorney-client relationship is established between Harlan and any Storey & Associates client.

Storey & Associates may utilize the services of ByAllAccounts, Inc., a financial data aggregation provider, that will allow us to provide additional analysis and financial reports regarding your accounts. The ByAllAccounts aggregation engine automatically captures account information from thousands of financial institutions using on-line services, such as web sites, these firms make available to their customers. Storey &

Associates is independently owned and operated and has no affiliation with ByAllAccounts, Inc.

Item 11: Code of Ethics

Storey & Associates maintains a Code of Ethics that states we will place the client's interests first and will refrain from having outside interests that conflict with the client. The Code of Ethics also requires us to disclose any potential and actual conflicts of interest to clients. We also adhere to the codes of ethics for both the National Association of Personal Financial Advisors (NAPFA) and CFP Board of Standards.

We will provide a copy of our Code of Ethics to clients and prospective clients upon request.

Because our associates sometimes buy and sell the same securities in their personal accounts that we recommend for clients, it is our policy to perform client trades before associate trades.

All Storey & Associates employees must adhere to our policies and procedures regarding insider trading. Employees are prohibited from trading, either personally or on behalf of others, while in possession of material nonpublic information. Employees are also prohibited from communicating material nonpublic information to others.

Item 12: Brokerage Practices

Selecting Custodians

Storey & Associates does not maintain custody of the assets that we manage or advise on behalf of our clients, although we may be deemed to have custody of client's assets if they give us authority to withdraw assets directly from their account (see Custody section for further information). We recommend our clients use Charles Schwab Institutional (Schwab) as their qualified custodian. We are independently owned and operated and are not affiliated with Schwab. Schwab will hold client assets in a brokerage account and buy and sell securities when we or the client instruct them to. While we may recommend or require that the client use Schwab as custodian/broker, the client will decide whether to do so, and will open an account with Schwab by entering into an account agreement directly with them.

We prefer Schwab to other custodians because of the benefits they provide to our clients. We weigh such criteria as the custodian's reputation, financial strength, past exhibited service levels, the breadth of available investment products, and the ability to efficiently execute trades in client accounts. We also pay close attention to the expenses paid by our clients to the custodian in return for general account service. We periodically evaluate Schwab against other custodians to compare costs and benefits

and to ensure our clients are receiving service levels commensurate with the fees charged by Schwab.

Complimentary Research Material and “Soft Dollars”

Charles Schwab Advisor Services™ (formerly called Charles Schwab Institutional) is Schwab’s business serving independent investment advisory firms like Storey & Associates. They provide us and our clients with access to its institutional brokerage—trading, custody, reporting, and related services—many of which are not typically available to Schwab retail customers. Schwab also makes available various support services. Some of those services help us manage or administer our clients’ accounts, while others help us manage and grow our business. Schwab’s support services generally are available on an unsolicited basis (we don’t have to request them) and at no charge to us, however, we pay a fee to utilize Schwab’s portfolio performance and reporting software known as PortfolioCenter.

Some investment managers receive “soft dollars,” which are incentives that do not come in the form of direct compensation. An example of soft dollars received by an investment manager might be free participation at an industry conference sponsored by the custodian. Storey & Associates does not accept such incentives from our custodians.

Handling of Trade Errors

Trade errors made either by Storey & Associates or Schwab are handled in a favorable manner for the client, irrespective of the cause of the error. The handling of trade errors is as follows:

1. If Schwab is responsible for the error, they will correct it at no cost to the client and retain all gains or immediately remediate the account for the full amount of the loss incurred.
2. If Storey & Associates is responsible for the error, we will correct it at no cost to the client. It is Schwab’s policy to keep all gains, and if a loss was incurred it is our policy to immediately remediate the account for the full amount of the loss incurred.
3. Loss amounts are calculated by both Schwab and Storey & Associates by calculating the difference in market prices between the time the trade was actually executed, or should have been executed, and the time of the correcting trade(s).

Item 13: Review of Accounts

Storey & Associates review portfolios monthly, quarterly, and/or annually. The frequency of this review is determined by such factors as, but not limited to, how many

positions a portfolio holds, changes in the economy, changes in clients' circumstances, concerns regarding investment suitability, or unanticipated cash needs.

Individual investments such as mutual funds, ETFs, stocks, and bonds are monitored continually by Storey & Associates' investment team, which is composed of Harlan G. Storey and Justin G. Rush. Research on investments is delegated to each individual on the investment team. The investment team meets no less than quarterly to review all current holdings and determine whether target allocations remain appropriate. The final decision-making responsibilities fall to Harlan G. Storey.

Harlan G. Storey and Justin G. Rush routinely monitor their assigned clients' portfolios and financial plans on a quarterly basis. Additional reviews by the financial advisors are often motivated by a specific client request or action such as an unanticipated deposit or withdrawal. Changes in personal circumstances, such as the loss of a spouse or a change in employment status, might also trigger a review.

Storey & Associates prepares and distributes quarterly statements to our clients. Clients may elect to receive this statement either by mail or in an electronic format. In all cases, clients will receive a year-end statement by mail. This quarterly statement shows each account a client has and the value for all the accounts in aggregate as of the end of a specific quarter; it does not show transaction activity. Transaction activity is outlined in the monthly statements that the client receives directly from their custodian.

Item 14: Client Referrals and Other Compensation

Storey & Associates does not participate in any referral programs. We will occasionally refer a client to a third-party individual or firm who has particular knowledge of an area, but we receive no compensation for such referrals. We are grateful if and when someone refers a client to our firm, but we do not offer any compensation for such referrals.

Item 15: Custody

Under government regulations, Storey & Associates is deemed to have custody of your assets if, for example, you authorize us to instruct Schwab to deduct our advisory fees directly from your account. Schwab maintains actual custody of your assets. Your custodian will provide account statements at least quarterly. We urge you to carefully review such statements and compare such official custodial records to the statements that we provide to you. The custodial statements are the accurate record in regards to your account(s) and any discrepancies should be brought to the attention of Storey & Associates in writing. Quarterly statements provided by Storey & Associates, may vary slightly from custodial statements based on accounting procedures, reporting dates, or valuation methodologies of certain securities.

Item 16: Investment Discretion

Storey & Associates typically accepts discretionary authority to manage securities accounts on behalf of our clients. Clients enter into this agreement by signing a Limited Power of Attorney document, Discretionary Authority Agreement, or account application furnished by the custodian that grants certain defined permissions to our firm. These permissions typically include authorization to conduct trades and/or authorization to deduct fee payments. These permissions might include authorization to make disbursements to banks, previously authorized accounts held with the same custodian, or other financial institutions as well as the authorization to make disbursements directly to the client. These permissions do not typically include the ability to transfer money into the account or out of the account to any entity not described above. A client may revoke these authorizations at any time by contacting their custodian.

If a client wishes us to manage a retirement plan, or any other account, held outside of Charles Schwab, they will be required to sign a Discretionary Authority Agreement. The Discretionary Authority Agreement grants us authority to:

1. Buy and sell available securities within the account(s)
2. Obtain account valuations and other information as often as necessary

It does not give us power to execute withdrawals or change beneficiary designations on the accounts.

Item 17: Voting Client Securities

As a matter of firm policy and practice, Storey & Associates does not have any authority to and does not vote proxies on behalf of investment advisory clients. Clients retain the responsibility for receiving and voting proxies for any and all securities maintained in their accounts. Storey & Associates may provide advice to clients regarding the clients' voting of proxies, if so requested.

Item 18: Financial Information

Pursuant to the SEC's guidelines, we are not required to furnish a balance sheet because we do not require prepayment of more than \$1200 per client six months or more in advance. We have no financial conditions that we believe are reasonably likely to impair our ability to meet our contractual commitments.

Brochure Supplement



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September 30, 2011

FORM ADV PART 2B
BROCHURE SUPPLEMENT

Supervised Persons

Harlan G. Storey and Justin G. Rush

This brochure supplement provides information about Harlan G. Storey and Justin G. Rush that supplements the Storey & Associates brochure (Form ADV Part 2A). You should have received a copy of that brochure. Please contact Storey & Associates if you did not receive the firm's brochure or if you have any questions about the content of this supplement.

Additional information about our advisory associates is available on the SEC's website at www.adviserinfo.sec.gov.

Professional Certifications

Employees have earned certifications and credentials that we are required to explain in further detail.

CERTIFIED FINANCIAL PLANNER™ (CFP®)

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.

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, administered in 10 hours over a two-day period, 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:

- 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

- 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.

Supervised Persons

Harlan G. Storey, JD, CFP® - Owner, Chief Compliance Officer

Harlan, born in 1953, was the founder of Cornerstone Capital Advisors, a registered investment adviser in Green, Ohio, in 1987. In 2009, he once again founded his own firm, Storey & Associates, located in North Canton, Ohio. He earned degrees in accounting and law from the University of Akron in 1973 and 1979, respectively. He has been a CFP® practitioner since 1988.

Disciplinary Information: None

Other Business Activities: Harlan G. Storey, in his separate individual capacity, is licensed to engage in the practice of law. Harlan’s legal practice is not material to Storey & Associates investment advisory business or other services. His services are not available to the general public and, unless he has been separately engaged by any Storey & Associates client to provide legal services, absolutely no corresponding attorney-client relationship is established between Harlan and any Storey & Associates client.

Additional Compensation: None

Supervision: Harlan’s investment-related activities are supervised by Justin G. Rush.

Justin G. Rush, CFP® - Financial Planning Analyst

Justin, born in 1985, joined Storey & Associates in 2009 as a Financial Planning Analyst. Prior to Storey & Associates, Justin spent two and a half years in a similar role with other registered investment advisers. Justin earned degrees in accounting and business administration from Mount Union College in 2007. He has been a CFP® practitioner since 2010.

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision: Justin's investment-related activities are supervised by Harlan G. Storey.