

*This brochure supplement provides information about Bruce Harold Boyd that supplements the Boyd Investment Management, LLC brochure. You should have received a copy of that brochure. Please contact Bruce Harold Boyd, Managing Member if you did not receive Boyd Investment Management, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Bruce Harold Boyd is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

# **Boyd Investment Management, LLC**

## **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**Bruce Harold Boyd**

Personal CRD Number: 3106206

Investment Adviser Representative

Boyd Investment Management, LLC  
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Burleson, Texas, 76028  
(817) 753-4050  
[bruce@newportpelican.com](mailto:bruce@newportpelican.com)

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## **Item 2: Educational Background and Business Experience**

**Name:** Bruce Harold Boyd

**Born:** 1950

### **Education Background and Professional Designations:**

#### **Education:**

BA Business, Oklahoma State University - 1972

#### **Business Background:**

2011 - Present	Managing Member Boyd Investment Management, LLC
1990 - Present	Owner Newport Pelican Group, Inc
2003 - Present	CEO/Owner Heritage Planning Financial Group, Inc.
2004 - Present	Owner Pelican Properties BZE, Inc.
2004 - 2010	Registered Representative United Planners Financial Services

### **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**

Bruce Harold Boyd is a licensed insurance agent and owner of the insurance agency, Heritage Planning Financial Group, Inc. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. BIM always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of BIM in their capacity as an insurance agent.

Bruce Harold Boyd is also the owner of Newport Pelican Group, Inc a management consulting business, and owner of Pelican Properties BZE, Inc a restaurant and bar business. From time to time, he will offer clients advice or products from those activities. BIM always acts in the best interest of the client.

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

Other than salary, annual bonuses, regular bonuses, Bruce Harold Boyd does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Boyd Investment Management, LLC.

### **Item 6: Supervision**

As the majority owner and representative of Boyd Investment Management, LLC, Bruce Harold Boyd supervises all duties and activities. Bruce Harold Boyd's contact information is on the cover page of this disclosure document.