

ITEM 1 Cover Page for Part 2B of Form ADV – Brochure Supplement

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This brochure supplement provides information about **Tara Tussing Unverzagt** that supplements the South Bay Financial Partners brochure. You should have received a copy of that brochure. Please contact Tara Unverzagt if you did not receive the South Bay Financial Partners brochure or if you have any questions about the contents of this supplement.

Additional information about Tara Tussing Unverzagt is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Tara Tussing Unverzagt, born in 1963, has been working in financial planning and investment advice for over 20 years. She specializes in multigenerational financial planning and in financial issues for charities and charitable giving. She is currently on several charity boards. Tara started her career in software programming and systems design. Her strength lies in project management, where she was consistently able to complete projects on time and under budget. After ten years in the computer business, she turned her attention to the financial industry.

Tara received a Bachelor of Science degree in Computer Science from Purdue University and an MBA from Pepperdine University. She has completed the NEFE College of Financial Planning Program and is a Certified Financial Planner (CFP).

Robert M Unverzagt, born in 1964, has had a thirty-year career in aerospace engineering working for Aerospace Corporation. He received his Bachelor of Science degree in Aerospace Engineering from the University of Notre Dame, and a Master of Science degree in Aerospace Engineering from UCLA. He is currently Secretary of the Board at South Bay Financial Partners.

Janet M. Tussing, CFP, active in the field of personal financial management for over three decades, Janet, has conducted a variety of workshops and seminars at Roosevelt University, Northeastern Illinois University, and the American Bar Association.

Janet is a Certified Financial Planner (CFP) and was admitted to the Registry of the International Association of Financial Planners. She is a past President of the Greater Chicago Society of the Institute of Certified Financial Planners, former Chair of the Illinois Association of Certified Financial Planners, and a former member of the Adjunct Faculty of the College for Financial Planning in Denver, Colorado. In 1997, Janet was named to Worth Magazine's list of the nation's 240 Best Financial Advisors. Janet received her Bachelor of Arts degree in Mathematics from the University of Iowa. She is also a Paralegal, with a concentration in Probate and Estate Planning.

Item 3 Disciplinary Information

No employees of South Bay Financial Partners has been involved in any legal or disciplinary events material to evaluation of her. These include:

- A. No criminal or civil actions in a domestic, foreign or military court of competent jurisdiction;
- B. No administrative proceedings before the SEC, any other federal regulatory agency, and state regulatory agency, or any foreign financial regulatory authority;
- C. No self-regulatory organization proceedings;
- D. Any other hearing or formal adjudication in which a professional attainment, designation, or license was revoked or suspended because of a violation of rules relating to professional conduct.

Item 4 Other Business Activities

Tara Unverzagt also works with other professionals, investment advisers, and tax preparers. No payment is made or received for referrals of the clients from the other investment advisers.

Robert Unverzagt works full time at Aerospace Corporation. He does not work in the financial industry in any capacity other than Secretary of the Board at South Bay Financial Partners.

Janet Tussing works as an advisor and is part of the investment committee.

Tara does not receive compensation directly or indirectly from recommending or selecting other advisers for Clients.

Item 5 Additional Compensation

No one who is not a client provides an economic benefit to Tara Unverzagt for providing advisory services.

Item 6 Supervision

Tara Tussing Unverzagt is the President of South Bay Financial Partners and is responsible for all advisory activity on its behalf.

Item 7 Requirements for State-Registered Advisers

In addition to the events listed in Item 3 above, no employees of South Bay Financial Partners have been involved in any of the events listed below:

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500 of any type;
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding of any type.

No employees of South Bay Financial Partners have ever been the subject of a bankruptcy petition.