

Stephen H. Perrin, Sr.  
Stephen H. Perrin, Jr.  
Matthew B. Beamer  
Bethann Benz  
Joseph T. Perin

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**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Stephen H. Perrin, Sr., Stephen H. Perrin, Jr., Matthew B. Beamer, Bethann Benz and Joseph T. Perin that supplements the Coordinated Financial Planning, Inc. brochure. You should have received a copy of that brochure. Please contact Matthew B. Beamer, Chief Compliance Officer, at #513/769-3131 if you did not receive Coordinated Financial Planning, Inc.'s brochure or if you have any questions about the contents of this supplement.

## STEPHEN H. PERRIN, SR.

### **Education Background and Business Experience**

Form ADV Part 2B, Item 2

*Year of Birth:* 1948

#### *Formal Education after High School:*

- Sinclair College (OH), Business Administration, 1966-1968
- Research & Review Institute, Completed both parts, 1971
- American College, Chartered Life Underwriter, Completed 3 parts, 1976-1977
- Dennis Blitz Investment Institute, Completed, 1980
- College for Financial Planning, Certified Financial Planner™ (CFP®), 1988-1989

#### *Business Background for the Previous Five Years:*

- Coordinated Financial Planning, Inc., Chief Executive Officer and CFP®, 1983-Present

#### *Certifications:*

- Certified Financial Planner™ (CFP®), 1989: 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, 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 must provide 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.

**Disciplinary Information**

Form ADV Part 2B, Item 3

Mr. Perrin does not have any reportable disciplinary information.

**Other Business Activities**

Form ADV Part 2B, Item 4

Mr. Perrin has no other business activities.

**Additional Compensation**

Form ADV Part 2B, Item 5

Mr. Perrin does not receive any additional compensation for providing advisory services beyond that receives as Chief Executive Officer of Coordinated Financial Planning, Inc.

**Supervision**

Form ADV Part 2B, Item 6

As Chief Executive Officer of Coordinated Financial Planning, Inc., Mr. Perrin is not supervised by other persons. However, Coordinated Financial Planning, Inc. has in place written supervisory procedures that are designed to detect and prevent violations of the securities laws, rules and regulations.

## STEPHEN H. PERRIN, JR.

### **Education Background and Business Experience**

Form ADV Part 2B, Item 2

*Year of Birth:* 1969

#### *Formal Education after High School:*

- University of Cincinnati, A.A. Pre-Business Administration, 1992
- Northern Kentucky University, B.S. Finance, 1995
- College for Financial Planning, Certified Financial Planner™ (CFP®), 1998

#### *Business Background for the Previous Five Years:*

- Coordinated Financial Planning, Inc., CFP®, 1991-Present

#### *Certifications:*

- Certified Financial Planner™ (CFP®), 1998: The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards.

### **Disciplinary Information**

Form ADV Part 2B, Item 3

Mr. Perrin, Jr. does not have any reportable disciplinary information.

### **Other Business Activities**

Form ADV Part 2B, Item 4

Mr. Perrin, Jr. has no other business activities.

### **Additional Compensation**

Form ADV Part 2B, Item 5

Mr. Perrin, Jr. does not receive any additional compensation for providing advisory services beyond that received as a result of his capacity as Financial Planner for Coordinated Financial Planning, Inc.

### **Supervision**

Form ADV Part 2B, Item 6

Stephen H. Perrin, Sr., Chief Executive Officer, is responsible for supervising the advisory activities of Stephen H. Perrin, Jr. As part of his supervisory responsibilities Mr. Perrin, Sr. periodically reviews client accounts and communications with clients. Mr. Perrin, Sr. can be reached at #513/769-3131.

## MATTHEW B. BEAMER

### **Education Background and Business Experience**

Form ADV Part 2B, Item 2

*Year of Birth:* 1971

*Formal Education after High School:*

- Thomas More College, B.A. Accounting, 1993 and A.A. Business Administration, 1993
- College for Financial Planning, Certified Financial Planner™ (CFP®), 2001

*Business Background for the Previous Five Years:*

- Coordinated Financial Planning, Inc., CFP® and Chief Compliance Officer, 1996-Present

*Certifications:*

- Certified Financial Planner™ (CFP®), 1998: The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards.

### **Disciplinary Information**

Form ADV Part 2B, Item 3

Mr. Beamer does not have any reportable disciplinary information.

### **Other Business Activities**

Form ADV Part 2B, Item 4

Mr. Beamer has no other business activities.

### **Additional Compensation**

Form ADV Part 2B, Item 5

Mr. Beamer does not receive any additional compensation for providing advisory services beyond that received as a result of his capacity as Financial Planner and Chief Compliance Officer for Coordinated Financial Planning, Inc.

### **Supervision**

Form ADV Part 2B, Item 6

Stephen H. Perrin, Sr., Chief Executive Officer, and Stephen H. Perrin, Jr. are both responsible for supervising the advisory activities of Matthew B. Beamer. As part of his supervisory responsibilities Mr. Perrin, Sr. periodically reviews client accounts and communications with clients. Mr. Perrin, Sr. can be reached at #513/769-3131.

## BETHANN BENZ

### **Education Background and Business Experience**

Form ADV Part 2B, Item 2

*Year of Birth:* 1968

*Formal Education after High School:*

- ICM School of Business, Associate in Accounting, 1987
- College for Financial Planning, Completed 5 of 5 parts, 2004

*Business Background for the Previous Five Years:*

- Coordinated Financial Planning, Inc., Office Manager, 1999-Present

### **Disciplinary Information**

Form ADV Part 2B, Item 3

Ms. Benz does not have any reportable disciplinary information.

### **Other Business Activities**

Form ADV Part 2B, Item 4

Ms. Benz has no other business activities.

### **Additional Compensation**

Form ADV Part 2B, Item 5

Ms. Benz does not receive any additional compensation for providing services beyond that received as a result of her capacity as Office Manager for Coordinated Financial Planning, Inc.

### **Supervision**

Form ADV Part 2B, Item 6

Stephen H. Perrin, Sr., Chief Executive Officer, and Stephen H. Perrin, Jr. are both responsible for supervising the activities of Bethann Benz. As part of his supervisory responsibilities Mr. Perrin, Sr. periodically reviews client accounts and communications with clients. Mr. Perrin, Sr. can be reached at #513/769-3131.

## JOSEPH T. PERIN

### **Education Background and Business Experience**

Form ADV Part 2B, Item 2

*Year of Birth:* 1995

#### *Formal Education after High School:*

- University of Cincinnati, Carl H. Lindner College of Business; Bachelor of Business Administration in Finance, 2017 and Master of Science in Finance, 2018

#### *Business Background for the Previous Five Years:*

- Great American Insurance Group, Business/Data Analysis Intern, 2015-2017

#### *Certifications:*

- Candidate for Certified Financial Planner™ (CFP®), July 2020

### **Disciplinary Information**

Form ADV Part 2B, Item 3

Mr. Perin does not have any reportable disciplinary information.

### **Other Business Activities**

Form ADV Part 2B, Item 4

Mr. Perin has no other business activities.

### **Additional Compensation**

Form ADV Part 2B, Item 5

Mr. Perin does not receive any additional compensation for providing advisory services beyond that received as a result of his capacity as an Associate Financial Planner for Coordinated Financial Planning, Inc.

### **Supervision**

Form ADV Part 2B, Item 6

Stephen H. Perrin, Sr., Chief Executive Officer, and Stephen H. Perrin, Jr. are both responsible for supervising the advisory activities of Joseph T. Perin. As part of his supervisory responsibilities Mr. Perrin, Sr. periodically reviews client accounts and communications with clients. Mr. Perrin, Sr. can be reached at #513/769-3131.