



**Noven Financial Group, a Division of SRS
Capital Advisors, Inc.
Form ADV Part 2B Brochure Supplement**

Anjanette M. Phetteplace
CRD #5074559

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Noven Financial Group, a Division of SRS Capital Advisors, Inc.
1777 South Harrison Street, Suite 1500
Denver, CO 80210
p. (303) 782-9100
f. (303) 782-9722
w. www.srscapitaladvisors.com
e. info@srscap.com

This brochure supplement provides information about Anjanette M. Phetteplace that supplements the SRS Capital Advisors, Inc. brochure. You should have received a copy of that brochure. Please contact SRS Capital Advisors, Inc. if you did not receive SRS Capital Advisors, Inc.'s brochure or if you have any questions about the content of this supplement.

Additional information about Anjanette M. Phetteplace is available on the SEC's website at www.adviserinfo.sec.gov.

Form ADV Part 2B brochure supplements are not approved by the Commission or any state securities authority.

Item 2. Educational Background and Experience:

Anjanette Monique Phetteplace was born in 1973. Since March, 2001, Anjanette Phetteplace has served as Chief Compliance Officer (CCO) and advisor at Noven Financial Group, Inc. (NFG). In 2020, NFG merged with SRS Capital Advisors (SRS) and operates as a division of SRS. Anjanette also owns N&A Professional Group, P.C. (N&A), a Certified Public Accounting firm. In addition, Anjanette owns 100% of Harrison Street Management Services, Inc. (HSMS). HSMS is an employee leasing company that began in 2019. HSMS receives income from N&A for providing payroll, payroll tax, and retirement plan services for the employees leased from HSMS to N&A.

Anjanette has earned her Bachelor of Science in Accounting. She is a Certified Public Accountant (CPA) and a Certified Financial Planner® (CFP®).

Certified Public Accountant (CPA):

CPAs in the state of Colorado must currently complete the following requirements:

- **Educational Requirements:** earned a Bachelor's degree (or its equivalent) in the field with a minimum of 27 hours in accounting classes and 21 hours in general business classes. At least three of the hours must be in auditing; no more than six hours can be concentrated in any other single area
- **Experience Requirements:** an applicant must have worked in public accounting under the direct supervision of a licensed CPA in the state of Colorado for at least one year. The work the applicant has completed must be for the employer's clients and not for the employer and must be in one or more areas of accounting, including auditing, attestation, tax return preparation, or general accounting. The applicant may not have won any part of the business for which he is working or have any other financial interest in it
- **Additional Education in Place of Experience:** an applicant may substitute an additional 30 semester hours of accounting classes beyond those required to obtain a bachelor's degree, for a minimum total of 120 hours, for the one-year work requirement. Of those 120 hours, at least 45 must be in accounting courses and at least 36 must be in business administration
- **Uniform CPA Examination:** currently the Uniform CPA Examination includes four sections; applicants for a CPA license must pass all of them with a score of no lower than 75. The sections cover auditing and attestation, business environment and concepts, financial accounting and reporting, and regulation
- **Ethics Requirement:** current applicants must complete the American Institute of Certified Public Accountants (AICPA) Ethics Course, which is an 11-hour self-guided class available by correspondence or online
- **Application:** once an applicant has completed the above requirements, he must submit an application for a license to the Colorado State Board of Accountancy and pay a fee.

CPAs renew their designation every two years by completing 80 hours of continuing education. Four of these continuing education hours must be in Ethics.

Certified Financial Planner® (CFP®)

The CFP® certification is a financial planning designation administered by the Certified Financial Planning Board of Standards, Inc. CFP® candidates must pass the comprehensive CFP® Certification Examination, pass CFP® Board's Fitness Standards for Candidates and Registrants, agree to abide by CFP® Board's Code of Ethics and Professional Responsibility which puts clients' interests first, and comply with the Financial Planning Practice Standards which spell out what clients should be able to reasonably expect from the financial planning engagement.

To become certified, CFPs® must meet the following requirements:

- **Education:** candidates for certification must have a bachelor's degree (or higher), or its equivalent, in any discipline, from an accredited college or university in order to obtain the CFP® certification.
- **Examination:** candidates must pass the CFP® Certification Examination
- **Experience:** candidates must have three years of full-time relevant personal financial planning experience
- **Ethics:** candidates are required to agree to adhere to the CFP® Board's Code of Ethics and Professional Responsibility, Rules of Conduct, and Financial Planning Practice Standards

Designees renew their designation every two years by completing 30 hours of continuing education.

Item 3. Disciplinary Information:

None

Item 4. Other Business Activities:

Anjanette Phetteplace is an owner of N&A, a Certified Public Accounting firm. N&A clients may become NFG/SRS clients and NFG/SRS clients may become N&A clients. The practice of referring clients of NFG/SRS to N&A and vice versa may present a conflict of interest. Clients of NFG/SRS are not required to become clients of N&A. Clients of N&A are not required to become clients of NFG/SRS.

Anjanette Phetteplace owns 100% of HSMS, an employee leasing company.

Item 5. Additional Compensation:

Anjanette Phetteplace receives additional compensation from the other business activities she performs for N&A.

Item 6. Supervision:

SRS Capital Advisors, Inc. closely monitors the recommendations and planning provided by all of its investment professionals. This is done through monthly and annual compliance meetings, random Associate audits, planned file reviews, clear and concise internal policies and procedures, and strict adherence to all industry laws and regulations. For additional information regarding our internal quality and control procedures please contact: Michael P. Riordan, Managing Director at SRS Capital Advisors at (412) 741-4200; or, via email at: mrriordan@srsicap.com.