

*This brochure supplement provides information about Joseph Manko that supplements the Advice & Planning Services LLC brochure. You should have received a copy of that brochure. Please contact Ryan Naugle, Chief Compliance Officer, if you did not receive Advice & Planning Services LLC's brochure or if you have any questions about the contents of this supplement.*

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

# **Advice & Planning Services LLC**

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

*for*

**Joseph Manko**

Personal CRD Number: 7305151  
Investment Adviser Representative

Advice & Planning Services LLC  
10 North 4<sup>th</sup> Street  
Suite 100  
Youngwood, PA 15697  
724-635-0427  
[ryan@adviceandplanning.com](mailto:ryan@adviceandplanning.com)

UPDATED: 10/22/2020

## Item 2: Educational Background and Business Experience

**Name:** Joseph Manko

**Born:** 1988

### Educational Background and Professional Designations:

#### Education:

BSBA Finance, Slippery Rock University - 2012

#### Business Background:

2020 - Current	Investment Advisor Representative Advice & Planning Services
2017 - 2020	Commercial Sales Manager Jim Shorkey Family Auto Group
2016 - 2017	Territory Account Manager Zoresco Equipment Company
2014 - 2016	Salesman Barnes Bros. Motorcycles & Off-Road
2013 - 2014	General Manager Schulz Service Center

## 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

Joseph Manko is not actively engaged in any other investment-related businesses or occupations.

Joseph Manko is not actively engaged in any non-investment-related business or occupation for compensation.

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

Joseph Manko does not receive any economic benefit from any person, company, or organization, other than Advice & Planning Services LLC in exchange for providing clients advisory services through Advice & Planning Services LLC.

### **Item 6: Supervision**

As the Chief Compliance Officer of Advice & Planning Services LLC, Ryan Naugle supervises all activities of the firm. Ryan Naugle's contact information is on the cover page of this disclosure document. Joseph Manko adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

### **Item 7: Requirements For State Registered Advisers**

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

A. Joseph Manko has NOT 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, involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.
2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
  - a) an investment or an investment-related business or activity;
  - b) fraud, false statement(s), or omissions;
  - c) theft, embezzlement, or other wrongful taking of property;
  - d) bribery, forgery, counterfeiting, or extortion; or
  - e) dishonest, unfair, or unethical practices.

B. Joseph Manko has NOT been the subject of a bankruptcy petition in the past ten years.