



Form ADV Part 2 – Disclosure Brochure

Updated March, 2020

Spartan Planning Group
1931 New Garden Rd, Ste 220, Greensboro, NC 27410
800-371-1292

hello@spartanplanninggroup.com
<http://www.SpartanPlanningGroup.com>

This brochure provides information about the qualifications and business practices of Spartan Planning. If you have any questions about the contents of this brochure, please contact us at **800.371.1292** or hello@SpartanPlanningGroup.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority. Additional information about Spartan Planning also is available on the SEC's website at www.adviserinfo.sec.gov. Our CRD # is 166599

Spartan Planning ADV Part 2 Disclosure Brochure

Item 3.

Table of Contents

Item 4	Advisory Business
Item 5	Fees & Compensation
Item 6	Performance-based fees and side-by-side management
Item 7	Types of clients
Item 8	Methods of analysis, investment strategies and risk of loss
Item 9	Disciplinary information
Item 10	Other financial industry activities and affiliations
Item 11	Code of ethics, participation or interest in client transactions and personal trading
Item 12	Brokerage practices
Item 13	Review of accounts
Item 14	Client referrals and other compensation
Item 15	Custody
Item 16	Investment discretion
Item 17	Voting client securities
Item 18	Financial information
Item 19	Personnel providing investment advice

Spartan Planning ADV Part 2 Disclosure Brochure

Item 4

Advisory Business

Spartan Planning & Wealth Management, LLC (“Spartan Planning”) dba Spartan Planning Group is a registered investment advisor with the State of North Carolina. Spartan Planning was formed in Jan 2013 as a Limited Liability Company under the laws of the State of North Carolina that conducts business in North Carolina and other states. The majority stake in Spartan Planning is owned by David Childs, CFP®. Other minority owners include Ira Ross, Blaise Stevens, Jon Robinson, and Brandon Langley.

Spartan Planning is a financial planning and wealth management firm, offering integrated financial planning and asset management services. Spartan Planning has developed a client service model that includes discovery, implementation, as well as monitoring progress of clients engaged with Spartan Planning.

The investment advice provided by Spartan Planning focuses on the individual needs of each client, household or business. Through questionnaires, gathering of documents from the client and conversations and depending on the stated objectives of the relationship, Spartan Planning will review some or all of the following: the client’s personal situation and circumstances and individual objectives, risk tolerance, time horizon, liquidity needs, constraints, growth and income needs and expectations as well as estate tax and income tax considerations.

Clients may request reasonable restrictions on investing in certain securities, types of securities, or industry sectors

We strongly believe in all six of the core steps to quality financial planning laid out by the Certified Financial Planning Board of Standards. Those are:

Financial Planning Process:

1. Establish and defining the client-planner relationship
2. Gather client information and data, including goals
3. Analyzing and evaluating your financial status
4. Developing and presenting financial planning recommendations and possible alternatives
5. Implementing the financial planning recommendations
6. Monitoring the status and progress of the implemented financial planning recommendations

Perhaps the most important parts to this “planning” process are these final two steps that many people overlook. A “plan” presentation is only a snapshot in time and is similar to a “flight plan” before a plane takes off. The pilot knows where they are and he knows where he needs to land but he doesn’t yet know what the 1,000 mid-course corrections will be over the 3,000 mile flight.

Spartan Planning ADV Part 2 Disclosure Brochure

Similarly, our clients look to us to help guide them through this entire “flight path” of their life.

Our Principles:

1. Clients will always have their interests put first.
 - a. We are Fee-Only and do not sell any products.
2. Our recommendations will be simple to understand and straight forward
3. We are disciplined and restrained in our approach to investing.

Item 5

Fees & Compensation

Wealth Management Fee Schedule:

Assets Under Management	Annual Fee
First \$1,000,000	1.25%
Between \$1,000,001-3,000,000	0.95%
Between \$3,000,001-5,000,000	0.75%
Assets Over \$5,000,000	0.55%

Minimum annual fee = \$6,000

Fees are billed quarterly in advance.

We do not require nor solicit payment of Wealth Management fees for more than four (4) months in advance. Upon engagement Spartan Planning will invoice for the prorated first quarter of fees. When available, and after first payment of fees, Spartan Planning will automatically deduct fees from client accounts. If direct deduction of fees is not initiated and/or not available, Spartan Planning will invoice the client to pay outstanding fees within 30 days of receipt of invoice. Initial Wealth Management fees are based on the value of accounts on the date of first transfer. Thereafter, fees will be based on the value of the accounts on the last day of each quarter. Certain fees may be negotiable depending on existing/past relationship.

401k Plan Management:

Spartan charges a separate flat % of assets under management for 401k plan management. That fee varies depending on the complexity of the agreement.

Account Fees:

For combined households under \$250,000 in value there will be a \$4/month charge per account.

Financial Planning Fees/Rates:

Spartan Planning may, depending on the complexity of the engagement and services rendered, charge a financial planning fee (typically from \$1,500-\$5,000) for the initial comprehensive financial plan provided as a stand-alone plan or as part of our Wealth Management services.

Spartan Planning ADV Part 2 Disclosure Brochure

If an agreement to use Spartan Planning's Wealth Management services is terminated by the client, 30-days written notice will be required to establish the effective termination date of the agreement. Any prepaid, unearned fees are prorated and will be refunded.

Spartan Planning, in its sole discretion, may terminate a client agreement at any time for any reason including, but not limited to: a client refusing to provide or concealing pertinent information about financial information, a relationship that isn't mutually beneficial.

Other Fees & Expenses

All fees paid to Spartan Planning are separate and distinct from the fees and expenses charged by mutual funds and/or ETFs to their shareholders as well as fees and expenses charged by custodians and/or broker/dealers. These fees and expenses are described in each prospectus (in the case of custodian fees can generally be found on corresponding custodian's website and fee disclosure) will generally include a management fee, as well as other fees and expenses. Performance fees quoted by mutual fund companies are net of the deduction of their fees. Please refer to the "Brokerage Practices" section (Item 12) of this brochure for additional information on this topic.

Spartan Planning does not receive commissions or any compensation for making transactions in any Client account. As a Fee-Only advisor, Spartan Planning is paid exclusively by the Client (or the Client's representative) and not by any third party.

SubAdvisor Fees:

Households with a combined investment value under \$500,000 will access us via the Custodial Separate Account Exchange (SAE). This means the subadvisor, Blueprint Investment Partners LLC, will charge a separate fee of 0.25%. The quarter following your household reaching over \$500,000 in value you will move off the SAE and we will cover that fee on your behalf.

Item 6

Performance-Based Fees & Side-by-Side Management

Spartan Planning does not charge performance based fees and has no financial incentive to recommend any particular investment options for its clients.

Item 7

Types of Clients

Spartan Planning may provide services to a variety of Client types. Typical clients are individuals, small businesses, trusts and estates with investable assets between \$500,000 and \$10,000,000. Spartan Planning, in its sole discretion, may waive an account minimum based upon certain criteria including, but not limited to, future expected savings, related accounts, and pro-bono activities.

Spartan Planning ADV Part 2 Disclosure Brochure

Item 8

Methods of Analysis, Investment Strategies and Risk of Loss

The analysis and Investment Strategies utilized by the Adviser may vary significantly depending on the needs of a particular client, but all of the Adviser's recommendations are likely to be rooted in one or more of the following principles.

- Risk Profile - target the appropriate balance of risk and return to meet the needs of the client;
- Macro Direction - determine path and strength of overall markets and sectors (i.e., US/Foreign stocks, bonds, commodities, etc.);
- Micro Direction - determine path and strength of individual funds and securities;
- Volatility/Volume - determine stability and breadth of a particular directional move;
- Correlation - determine the relationship of a given sector/instrument to other investments held by the client; and/or
- Diversification - evaluate the appropriate allocation to various instruments to meet the client's risk profile.

Investing in securities involves the risk of loss that clients should be prepared to bear.

Risks

The Adviser primarily invests its client's assets in ETFs and individual securities, but may also, among other things, utilize narrow-based security index futures on behalf of its clients. All investment portfolios are subject to risks. Accordingly, there can be no assurance that clients will meet their investment objectives and goals, or that investments will not lose money.

Certain material risks to which the client's assets may be subject are discussed below.

Management Risks. While the Adviser manages client assets based on the Adviser's experience, research and proprietary methods, the value of client investment portfolios will change daily based on the performance of the underlying securities in which they are invested. Accordingly, client investment portfolios are subject to the risk that the Adviser allocates assets to asset classes that are adversely affected by unanticipated market movements, and the risk that the Adviser's specific investment choices could underperform their relevant benchmarks.

Risks of Investments in Mutual Funds, ETFs and Other Investment Pools. The Adviser

Spartan Planning ADV Part 2 Disclosure Brochure

may invest client portfolios in mutual funds, ETFs and other investment pools (“pooled investment funds”). Investments in pooled investment funds are generally less risky than investing in individual securities because of their diversified portfolios; however, these investments are still subject to risks associated with the markets in which they invest. In addition, pooled investment funds’ success will be related to the skills of their particular managers and their performance in managing their funds. Pooled investment funds are also subject to risks due to regulatory restrictions applicable to registered investment companies under the Investment Company Act of 1940, as amended.

Risks Related to Alternative Investment Vehicles. From time to time and as appropriate, the Adviser may invest a portion of a client’s portfolio in alternative vehicles. The value of client portfolios will be based in part on the value of alternative investment vehicles in which they are invested, the success of each of which will depend heavily upon the efforts of their respective managers. When the investment objectives and strategies of a manager are out of favor in the market or a manager makes unsuccessful investment decisions, the alternative investment vehicles managed by the manager may lose money. A client account may lose a substantial percentage of its value if the investment objectives and strategies of many or most of the alternative investment vehicles in which it is invested are out of favor at the same time, or many or most of the managers make unsuccessful investment decisions at the same time.

Equity Market Risks. The Adviser may invest portions of client assets directly into equity investments, primarily stocks, or into pooled investment funds that invest in the stock market. As noted above, while pooled investments have diversified portfolios that may make them less risky than investments in individual securities, funds that invest in stocks and other equity securities are nevertheless subject to the risks of the stock market. These risks include, without limitation, the risks that stock values will decline due to daily fluctuations in the markets, and that stock values will decline over longer periods (e.g., bear markets) due to general market declines in the stock prices for all companies, regardless of any individual security’s prospects.

Fixed Income Risks. The Adviser may invest portions of client assets directly into fixed income instruments, such as bonds and notes, or may invest in pooled investment funds that invest in bonds and notes. While investing in fixed income instruments, either directly or through pooled investment funds, is generally less volatile than investing in stock (equity) markets, fixed income investments nevertheless are subject to risks. These risks include, without limitation, interest rate risks (risks that changes in interest rates will devalue the investments), credit risks (risks of default by borrowers), or maturity risk (risks that bonds or notes will change value from the time of issuance to maturity).

Risks Associated with Electronic Trading or Order Routing Systems. Trading through an electronic trading or order routing system creates risks associated with system or component failure. In the event of system or component failure, the Adviser may not be able to enter new orders, execute existing orders, modify or cancel orders that were previously entered or determine the status of existing orders. This could result in financial losses to clients. The foregoing risks are just some of the most significant risks that may apply to a client’s

Spartan Planning ADV Part 2 Disclosure Brochure

investments. Clients should understand that investing in any securities, involves a significant risk of loss of both income and principal and that they should be prepared to bear such losses. Investment safety and satisfactory performance is in no way guaranteed and no incremental protections are offered via an investment account with the Adviser.

Item 9

Disciplinary Information

Spartan Planning does not have any legal, regulatory or disciplinary acts or events to disclose about itself or any of its employees.

Item 10

Other Financial Industry Activities and Affiliations

Our firm and our related persons are not engaged in any other financial industry activities.

Item 11

Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

The Code of Ethics adopted by Spartan Planning demands high ethical standards of business conduct by our employees and careful compliance with applicable federal securities laws. Our firm believes we have a duty to our clients to be loyal, fair, and act in good faith. Spartan Planning and our employees accept the obligation to adhere not only to the specific provisions of the Code of Ethics but to the general principles that form its foundation.

Our Code of Ethics includes policies and procedures for the review of monthly securities transactions reports as well as initial and annual securities holdings reports that must be submitted by the firm's access persons. It requires the prior approval of any acquisition of securities in a limited offering (i.e. a private placement) or an initial public offering. The code also incorporates oversight, enforcement, and recordkeeping provisions.

Spartan Planning ADV Part 2 Disclosure Brochure

Spartan Planning's Code of Ethics further includes the firm's policy prohibiting the use of material non-public information. While we do not believe that we have any particular access to non-public information, all employees are reminded that such information may not be used in a personal or professional capacity. A copy of our Code of Ethics is available to our advisory clients and prospective clients. You may request a copy by sending an email to david@spartanplanninggroup.com with subject matter "Please send me a copy of your Code of Ethics", or by calling 336.403.8946

Our Code of Ethics is designed to assure that the personal securities transactions, activities and interests of our employees will not interfere with (1) making decisions in the best interest of advisory clients and (2) implementing such decisions while, at the same time, allowing employees to invest for their own accounts.

Our firm and/or individuals associated with our firm may buy or sell for their personal accounts securities identical to or different from those recommended to our clients. In addition, any related person(s) may have an interest or position in a certain security which may also be recommended to a client. Because our employees' goals and risk tolerance may differ from those of our clients' goals and risk tolerances, our employees may invest in similar or different securities.

It is the expressed policy of our firm that no person employed by us may purchase or sell any security prior to a transaction(s) being implemented for an advisory account, thereby preventing such employee(s) from benefiting from transactions placed on behalf of advisory accounts. Any client who has trades placed by us at the same time as an employee purchases those same securities the client is entitled to the lower priced order received.

Item 12

Brokerage Practices

For discretionary clients, unless we receive specific written instructions from a client regarding the placement of brokerage business, Spartan Planning will determine or recommend the custodian to use. Spartan Planning evaluates, among the custodians it has access to, the firms in terms of several criteria including best execution abilities, trading costs, and level of service provided to our firm and our clients as well as other factors. The most important factor is giving clients the best execution price offset by trading costs. If our Client directs our firm to use a specific broker or dealer, we cannot guarantee best execution or any of these other factors.

As a matter of policy and practice, Spartan Planning may not block trade our client accounts and, therefore, may typically implement client transactions separately for each account. Due to this practice, certain client trades may be executed before or after others and, depending on the type of security traded, may be executed at a different price and/or commission rate. Additionally, Spartan Planning clients may not receive certain volume discounts which may be available to advisers that block client trades.

Spartan Planning ADV Part 2 Disclosure Brochure

Spartan Planning may receive research products and/or software and/or services from certain brokerage firms. These products/services are often provided to investment adviser firms. These products/services may include items such as: industry related webinars, service and support staff, market analysis and research products and possibly a discounted rate to attend an industry conference.

Item 13

Review of Accounts

A. Frequency of Reviews

Wealth Management Clients:

While the underlying securities within our Clients' investment accounts are monitored continuously as needs arise, the actual client accounts are monitored and reviewed no less often than quarterly.

Wealth Management Clients will also often have Financial Planning services as part of their engagement. Financial Planning reviews may be more or less frequent depending on each Client's situation and financial circumstances. Wealth Management reviews are performed by David Childs, CFP®, Director of Wealth Management and/or Ira Ross and/or Blaise Stevens and/or Eric Warren.

Financial Planning Only Clients:

Occasionally a client will engage us for "Financial Planning Only" services – sometimes with regular annual updates and sometimes on an "as needed basis". Although this is not our recommended path for management of a client's situation since a "plan" delivery only represents a "snapshot" at a point in time, we will sometimes honor this request to engage depending on the circumstances and reasons proposed by the client.

In the case of a one time or "as needed" planning engagement we will agree up front to how frequently to update the plan. Financial Planning reviews are performed by David Childs, CFP®, Director of Wealth Management and/or Blaise Stevens and/or Eric Warren.

B. Triggers for Additional Reviews

Spartan Planning ADV Part 2 Disclosure Brochure

More frequent reviews may be triggered by material changes in a number of variables. Among these are changes in the Client's individual circumstances, or on the changes in market, political, regulatory or other economic considerations.

C. Reports

The content included in a client's financial plan will vary according to the Client's individual needs. Subsequent updates to the plan will be reported to the client in various formats and methods, as dictated by each Client's individual circumstances.

In addition to the monthly or quarterly reports sent to Clients by the custodian (also referred to as broker/dealer elsewhere) Spartan Planning will send written performance reports at least annually to each client

Item 14

Client Referrals and Other Compensation

Spartan Planning is an advisory firm who is compensated solely by the Client. Our firm does not receive any commissions or other compensation from product sponsors, custodians or any other third party for putting our clients in particular investments. Subject to applicable law, the Adviser may receive compensation from certain third-parties for referring non-Spartan clients to the third-party.

Subject to applicable law, the Adviser may compensate certain third-parties who refer it clients. Any fees paid to third-parties who refer clients to the Adviser will be paid out of the Adviser's earnings and the referred clients will not be subjected an increased fee as a result of the third party being paid a referral fee.

Item 15

Custody

Spartan Planning does not accept or maintain custody of Client accounts. All Clients must place their assets with a qualified custodian, often recommended by us but not related to our firm. For more information on custodians and brokerage practices, see Item 12 - Brokerage Practices.

While Spartan Planning does not have custody of Client funds or securities, payments of fees may be paid by the custodian from the custodial brokerage account that holds Client assets. In certain jurisdictions this may be deemed constructive custody. Prior to permitting direct debit of fees each Client provides written authorization permitting fees be paid direct from the custodian. Spartan

Spartan Planning ADV Part 2 Disclosure Brochure

Planning will invoice the custodian for the amount of the fees to be deducted from the Client's account[s]. The custodian will send to the Client an account statement no less than quarterly showing all account activity, including the amounts disbursed from the account to Spartan Planning.

Because the custodian does not calculate the amount of the fee to be deducted, Spartan Planning strongly recommends clients carefully review their custodial statements to verify the accuracy of the fee calculation and any other transactions. Clients should contact us directly if they believe there may be an error in their statement.

Item 16

Investment Discretion

Spartan Planning is granted discretion over the selection and amount of securities to be bought or sold in Client accounts without obtaining prior consent or approval from the Client. Discretionary authority will be granted upon and evidenced by the Client's execution of an Advisory Agreement or equivalent authorization document.

Spartan Planning may, in its sole discretion, hire outside consultants and investment sub-advisors to help research and implement certain investment strategies. These consulting and sub-advisory services are provided at no additional cost to clients and are paid for out of Spartan Planning's general operating cash.

Item 17

Voting Client Securities

As a matter of firm policy, we do not vote proxies on behalf of clients. Therefore, although our firm may provide investment advisory services relative to client investment assets, clients maintain exclusive responsibility for: (1) directing the manner in which proxies solicited by issuers of securities beneficially owned by the client shall be voted, and (2) making all elections relative to any mergers, acquisitions, tender offers, bankruptcy proceedings or other type events pertaining to the client's investment assets. Clients are responsible for instructing each custodian of the assets, to forward to the client copies of all proxies and shareholder communications relating to the client's investment assets. Spartan Planning welcomes client questions in making these decisions.

Spartan Planning ADV Part 2 Disclosure Brochure

Item 18

Financial Information

Under no circumstances does Spartan Planning require or solicit payment of fees more than six (6) months in advance of services rendered, and usually soliciting payment of fees no more than three (3) months in advance of services rendered.

Item 19

Personnel Responsible for Investment Advice

David D. Childs, CFP®

David received his Bachelors of Science degree in Finance from University of North Carolina at Greensboro. He was on the Dean's list in the Bryan School of Business and was inducted into the Financial Management Association Honors Society also while at UNCG. He was appointed by the North Carolina Governor to serve as the only non-lawyer on the State Judicial Council. As "Chief Listener" and Director of Planning at Spartan Planning, David employs much of what he learned through his career as well as his CERTIFIED FINANCIAL PLANNER coursework. The CERTIFIED FINANCIAL PLANNER coursework involved 180 class hours of training on various topics (i.e. Financial Planning Process & Risk Management, Investment Planning, Tax Planning, Estate Planning, and Retirement Planning & Employee Benefits) as well as 30 hours of tests (comprised of 5 separate 4-hour module tests and a final "Capstone" 10 Hour CFP Board exam). Prior to founding Spartan Planning & Wealth Management David worked for the investment services department of a community bank as well as another registered investment advisor working with clients with complex situations. Those clients typically had a net worth between \$500k and \$100mm with a typical investable net worth of between \$250k and \$20mm.

Ira Ross

Ira received his Bachelors of Arts degree in Economics and Business Administration from Guilford College where he was on the Dean's list. He received his Master of Arts degree in Economics with a concentration in Finance from the University of Nebraska. As Senior Advisor at Spartan Planning, Ira brings the knowledge gained through five decades of varied experience as a Research Economist and an Equity Portfolio Manager. Prior to joining Spartan Planning & Wealth Management, Ira worked first as an economist with The Federal Reserve System as well as with a prominent investment bank and a mutual fund manager. Later, at a major Wall Street firm, Ira led a team of asset managers in the investment of several billion dollars of equities for both institutional and individual clients. He holds both the Series 63 and the Series 65 designations.

Spartan Planning ADV Part 2 Disclosure Brochure

Blaise Stevens

Part 2B – Brochure Supplement

Item 1

Supplemental Information on David D. Childs, CFP®

Spartan Planning Group
1931 New Garden Rd, Ste 220
Greensboro, NC 27410

Supplement date: 03/30/2020

This brochure supplement provides information about David Childs that supplements the Spartan Planning Group brochure. You should have received a copy of that brochure. Please contact your contact at Spartan Planning if you did not receive Spartan Planning's brochure or if you have any questions about the contents of this supplement.

Additional information about David Childs is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2

David received his Bachelors of Science degree in Finance from University of North Carolina at Greensboro. He was on the Dean's list in the Bryan School of Business and was inducted into the Financial Management Association Honors Society also while at UNCG. David was born in 1984. David has his Certified Financial Planner designation. The CERTIFIED FINANCIAL PLANNER (CFP®) coursework involved 180 class hours of training on various topics (i.e. Financial Planning Process & Risk Management, Investment Planning, Tax Planning, Estate Planning, and Retirement Planning & Employee Benefits) as well as 30 hours of tests (comprised of 5 separate 4-hour module tests and a final "Capstone" 10 Hour CFP Board exam).

Item 3

There is no disciplinary information for David Childs

Item 4

Not applicable.

Item 5

Not applicable

Item 6

This person is supervised by the Chief Compliance Officer, David Childs, who may be contacted at 336.403.8946. All material investment and financial planning advice is to be documented in our CRM and/or in client meeting notes and will be approved by or shared with our investment committee or financial planning committee.

Item 7

Not applicable

Spartan Planning ADV Part 2 Disclosure Brochure

Item 1

Supplemental Information on Ira Ross

Spartan Planning Group
1931 New Garden Rd, Ste 220
Greensboro, NC 27410

Supplement date: 03/30/2020

This brochure supplement provides information about Ira Ross that supplements the Spartan Planning Group brochure. You should have received a copy of that brochure. Please contact your contact at Spartan Planning if you did not receive Spartan Planning's brochure or if you have any questions about the contents of this supplement.

Additional information about Ira Ross is available on the SEC's website at

www.adviserinfo.sec.gov.

Item 2

Ira received his Bachelors of Arts degree in Economics and Business Administration from Guilford College where he was on the Dean's list. He received his Master of Arts degree in Economics with a concentration in Finance from the University of Nebraska. As Senior Advisor at Spartan Planning, Ira brings the knowledge gained through five decades of varied experience as a Research Economist and an Equity Portfolio Manager. Prior to joining Spartan Planning & Wealth Management, Ira worked first as an economist with The Federal Reserve System as well as with a prominent investment bank and a mutual fund manager. Later, at a major Wall Street firm, Ira led a team of asset managers in the investment of several billion dollars of equities for both institutional and individual clients. He holds both the Series 63 and the Series 65 designations.

Item 3

There is no disciplinary information for David Childs

Item 4

Not applicable.

Item 5

Not applicable

Item 6

This person is supervised by the Chief Compliance Officer, David Childs, who may be contacted at 336.403.8946. All material investment and financial planning advice is to be documented in our CRM, other software, and/or in client meeting notes and will be approved by or shared with our investment committee or financial planning committee.

Item 7

Not applicable

Spartan Planning ADV Part 2 Disclosure Brochure

Item 1

Supplemental Information on Blaise Stevens, CFP®

Spartan Planning Group
1931 New Garden Rd, Ste 220
Greensboro, NC 27410

Supplement date: 03/30/2020

This brochure supplement provides information about Blaise Stevens that supplements the Spartan Planning Group brochure. You should have received a copy of that brochure. Please contact your contact at Spartan Planning if you did not receive Spartan Planning's brochure or if you have any questions about the contents of this supplement.

Additional information about Blaise Stevens is available on the SEC's website at

www.adviserinfo.sec.gov.

Item 2

Blaise received his Bachelors of Science degree in Psychology from Western Carolina University and received his MBA from UNCG. Blaise has his Certified Financial Planner designation. The CERTIFIED FINANCIAL PLANNER (CFP®) coursework involved 180 class hours of training on various topics (i.e. Financial Planning Process & Risk Management, Investment Planning, Tax Planning, Estate Planning, and Retirement Planning & Employee Benefits) as well as 30 hours of tests (comprised of 5 separate 4-hour module tests and a final "Capstone" 10 Hour CFP Board exam).

Item 3

There is no disciplinary information for Blaise Stevens

Item 4

Not applicable.

Item 5

Not applicable

Item 6

This person is supervised by the Chief Compliance Officer, David Childs, who may be contacted at 336.403.8946. All material investment and financial planning advice is to be documented in our CRM, other software, and/or in client meeting notes and will be approved by or shared with our investment committee or financial planning committee.

Item 7

Not applicable

Spartan Planning ADV Part 2 Disclosure Brochure

Item 1

Supplemental Information on Eric Warren

Spartan Planning Group
1931 New Garden Rd, Ste 220
Greensboro, NC 27410

Supplement date: 03/30/2020

This brochure supplement provides information about Ira Ross that supplements the Spartan Planning Group brochure. You should have received a copy of that brochure. Please contact your contact at Spartan Planning if you did not receive Spartan Planning's brochure or if you have any questions about the contents of this supplement.

Additional information about Ira Ross is available on the SEC's website at

www.adviserinfo.sec.gov.

Item 2

Eric passed his Series 65 exam in 2019 and is now a financial advisor with Spartan Planning & Wealth Management.

Item 3

There is no disciplinary information for David Childs

Item 4

Not applicable.

Item 5

Not applicable

Item 6

This person is supervised by the Chief Compliance Officer, David Childs, who may be contacted at 336.403.8946. All material investment and financial planning advice is to be documented in our CRM, other software, and/or in client meeting notes and will be approved by or shared with our investment committee or financial planning committee.

Item 7

Not applicable