



Part 2B of Form ADV: Brochure Supplement

Michael D. Manjarrez

Investment Advisor

Whelan Financial was pleased to welcome Michael as an investment advisor in 2021. Though new, his humor coupled with his industry experience, has made it seem as though he has always been a part of our team.

When Michael is not meeting with his own clients, he is an integral part of our client services team. In addition, he serves on the investment and financial planning committees.

Whelan Financial

7700 N. Palm Ave., Ste. 201
Fresno, CA 93711
Telephone: 559.228.8002

03/26/2021

This Brochure Supplement provides information about Michael Manjarrez and supplements the Whelan Financial brochure. Please contact Taylor J. Whelan, CFP® at 559.228.8002 if you have any questions about the contents of this supplement.

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



Educational Background and Business Experience

Full Legal Name: Michael D. Manjarrez

Born: 1985

Education: Fresno Pacific University: BA, Business Management : 2012

Business Experience: Bolt Wealth Management from 4/2019 to 2/2021, Whelan Financial from 2/16/2021 to present. He holds a Series 65 license.

Disciplinary Information

Michael D. Manjarrez has no reportable disciplinary history.

Additional Compensation

Michael D. Manjarrez does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Other Business Activities

A. Investment Related Activities

1. Michael D. Manjarrez is not engaged in any other investment related activities.
2. Michael D. Manjarrez does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

B. Non-Investment Related Activities

Michael D. Manjarrez is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his time.

Supervision

Supervisor: Portia L. White, CFP®

Title: Vice President

Phone Number: 559.228.8002

Michael D. Manjarrez reports to Portia L. White, CFP® for all his activities and responsibilities related to Whelan Financial business.

Vincent J. Whelan, CFP®, is responsible for the supervision, formulation and monitoring of investment advice offered to clients. Mr. Whelan reviews and oversees all material investment policy changes and conducts periodic testing to ensure that client objectives and mandates are being met. He can be contacted at 559.228.8002.

