

**Item 1: Cover Page**  
**Part 2B of Form ADV: Brochure Supplement**  
**April 2022**

**Matthew Paul Sullivan**

**Financial Planning First, LLC**  
**3567 E Sunrise Dr Ste B237,**  
**Tucson, AZ 85718**

**[www.financialplanningfirst.com](http://www.financialplanningfirst.com)**

**Firm Contact:**  
**Matthew Sullivan**  
**Chief Compliance Officer**

This brochure supplement provides information about Mr. Sullivan that supplements our brochure. You should have received a copy of that brochure. Please contact Matthew Sullivan if you did not receive Financial Planning First's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Sullivan is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #1516530.

## Item 2: Educational Background & Business Experience

**Matthew Paul Sullivan**

**Year of Birth:** 1962

### **Educational Background:**

- 1980-1984: Michigan State University; BA & Economics
- 1996-1998: College for Financial Planning; CFP

### **Business Background:**

- 04/2022 – Present Financial Planning First, LLC; Chief Compliance Officer
- 08/2013 – Present Imus Wilkinson Investment Management; Investment Advisor Representative & Chief Compliance Officer
- 03/2013 – 07/2013 Business Planning & Preparation
- 08/2012 – 03/2013 Southwest Securities; Branch Manager
- 03/2007 – 08/2012 Merrill Lynch; Advisor/Branch Manager

### **Exams, Licenses & Other Professional Designations:**

- 1994: Series 65
- 1993: Series 63
- 1998: CERTIFIED FINANCIAL PLANNER™, CFP®

The CFP® certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam and agreeing to be bound by the CFP® board's *Standard of Professional Conduct*. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the *Standards of Professional Conduct*.

## Item 3: Disciplinary Information

There are no legal or disciplinary events material to the evaluation of Mr. Sullivan.

## Item 4: Other Business Activities

Mr. Sullivan is an investment advisor representative ("IAR") of Imus Wilkinson Investment Management LLC. A conflict of interest arises out of being an IAR for multiple investment advisory firms. To mitigate this conflict, our representatives will act in the Client's best interest. Furthermore,

any services offered through Imus Wilkinson Investment Management will remain separate from our firm's advisory services and will be governed under a separate agreement.

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

Mr. Sullivan does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### **Item 6: Supervision**

Mr. Sullivan is the sole owner and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.

### **Item 7: Requirements for State-Registered Advisers**

Mr. Sullivan has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, he has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.