

Stephen H. Perrin, Jr.
Matthew B. Beamer
Bethann Benz
Joseph T. Perin
Kevin J. Barto

Coordinated Financial Planning, Inc.
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**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Stephen H. Perrin, Jr., Matthew B. Beamer, Bethann Benz, Joseph T. Perin and Kevin J. Barto that supplements the Coordinated Financial Planning, Inc. brochure. You should have received a copy of that brochure. Please contact Matthew B. Beamer, Chief Compliance Officer, at #513/769-3131 if you did not receive Coordinated Financial Planning, Inc.'s brochure or if you have any questions about the contents of this supplement.

STEPHEN H. PERRIN, JR.

Education Background and Business Experience

Form ADV Part 2B, Item 2

Year of Birth: 1969

Formal Education after High School:

- University of Cincinnati, A.A. Pre-Business Administration, 1992
- Northern Kentucky University, B.S. Finance, 1995
- College for Financial Planning, Certified Financial Planner™ (CFP®), 1998

Business Background for the Previous Five Years:

- Coordinated Financial Planning, Inc., CFP®, 1991-Present

Certifications:

- Certified Financial Planner™ (CFP®), 1998: The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards.

Disciplinary Information

Form ADV Part 2B, Item 3

Mr. Perrin, Jr. does not have any reportable disciplinary information.

Other Business Activities

Form ADV Part 2B, Item 4

Mr. Perrin, Jr. has no other business activities.

Additional Compensation

Form ADV Part 2B, Item 5

Mr. Perrin, Jr. does not receive any additional compensation for providing advisory services beyond that received as Chief Executive Officer of Coordinated Financial Planning, Inc.

Supervision

Form ADV Part 2B, Item 6

As Chief Executive Officer of Coordinated Financial Planning, Inc., Mr. Perrin, Jr. is not supervised by other persons. However, Coordinated Financial Planning, Inc. has in place written supervisory procedures that are designed to detect and prevent violations of the securities laws, rules and regulations.

MATTHEW B. BEAMER

Education Background and Business Experience

Form ADV Part 2B, Item 2

Year of Birth: 1971

Formal Education after High School:

- Thomas More College, B.A. Accounting, 1993 and A.A. Business Administration, 1993
- College for Financial Planning, Certified Financial Planner™ (CFP®), 2001

Business Background for the Previous Five Years:

- Coordinated Financial Planning, Inc., CFP® and Chief Compliance Officer, 1996-Present

Certifications:

- Certified Financial Planner™ (CFP®), 1998: The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards.

Disciplinary Information

Form ADV Part 2B, Item 3

Mr. Beamer does not have any reportable disciplinary information.

Other Business Activities

Form ADV Part 2B, Item 4

Mr. Beamer has no other business activities.

Additional Compensation

Form ADV Part 2B, Item 5

Mr. Beamer does not receive any additional compensation for providing advisory services beyond that received as a result of his capacity as Financial Planner and Chief Compliance Officer for Coordinated Financial Planning, Inc.

Supervision

Form ADV Part 2B, Item 6

Stephen H. Perrin, Jr., Chief Executive Officer, is responsible for supervising the advisory activities of Matthew B. Beamer. As part of his supervisory responsibilities Mr. Perrin, Jr. periodically reviews client accounts and communications with clients. Mr. Perrin, Jr. can be reached at #513/769-3131.

BETHANN BENZ

Education Background and Business Experience

Form ADV Part 2B, Item 2

Year of Birth: 1968

Formal Education after High School:

- ICM School of Business, Associate in Accounting, 1987
- College for Financial Planning, Completed 5 of 5 parts, 2004

Business Background for the Previous Five Years:

- Coordinated Financial Planning, Inc., Office Manager, 1999-Present

Disciplinary Information

Form ADV Part 2B, Item 3

Ms. Benz does not have any reportable disciplinary information.

Other Business Activities

Form ADV Part 2B, Item 4

Ms. Benz has no other business activities.

Additional Compensation

Form ADV Part 2B, Item 5

Ms. Benz does not receive any additional compensation for providing services beyond that received as a result of her capacity as Office Manager for Coordinated Financial Planning, Inc.

Supervision

Form ADV Part 2B, Item 6

Stephen H. Perrin, Jr., Chief Executive Officer, is responsible for supervising the activities of Bethann Benz. As part of his supervisory responsibilities Mr. Perrin, Jr. periodically reviews client accounts and communications with clients. Mr. Perrin, Jr. can be reached at #513/769-3131.

JOSEPH T. PERIN

Education Background and Business Experience

Form ADV Part 2B, Item 2

Year of Birth: 1995

Formal Education after High School:

- University of Cincinnati, Carl H. Lindner College of Business; Bachelor of Business Administration in Finance, 2017 and Master of Science in Finance, 2018

Business Background for the Previous Five Years:

- Great American Insurance Group, Business/Data Analysis Intern, 2015-2017

Certifications:

- Certified Financial Planner™ (CFP®), July 2020; The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards.
- Chartered Financial Analyst™ (CFA®), Level Two Candidate

Disciplinary Information

Form ADV Part 2B, Item 3

Mr. Perin does not have any reportable disciplinary information.

Other Business Activities

Form ADV Part 2B, Item 4

Mr. Perin has no other business activities.

Additional Compensation

Form ADV Part 2B, Item 5

Mr. Perin does not receive any additional compensation for providing advisory services beyond that received as a result of his capacity as Financial Planner for Coordinated Financial Planning, Inc.

Supervision

Form ADV Part 2B, Item 6

Stephen H. Perrin, Jr., Chief Executive Officer, is responsible for supervising the advisory activities of Joseph T. Perin. As part of his supervisory responsibilities Mr. Perrin, Jr. periodically reviews client accounts and communications with clients. Mr. Perrin, Jr. can be reached at #513/769-3131.

KEVIN J. BARTO

Education Background and Business Experience

Form ADV Part 2B, Item 2

Year of Birth: 1988

Formal Education after High School:

- The University of Cincinnati, B.S. in Criminal Justice, 2020
- The American College, CFP® Certification Curriculum, 2021

Business Background for the Previous Five Years:

- Coordinated Financial Planning, Inc., 2021-Present

Certifications:

- Candidate for Certified Financial Planner™ (CFP®) Certification, : The program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP Board's code of ethics and professional responsibility and financial planning standards.

Disciplinary Information

Form ADV Part 2B, Item 3

Mr. Barto does not have any reportable disciplinary information.

Other Business Activities

Form ADV Part 2B, Item 4

Mr. Barto has no other business activities.

Additional Compensation

Form ADV Part 2B, Item 5

Mr. Barto does not receive any additional compensation for providing advisory services beyond that received as a result of his capacity as Financial Planner for Coordinated Financial Planning, Inc.

Supervision

Form ADV Part 2B, Item 6

Stephen H. Perrin, Jr., Chief Executive Officer, is responsible for supervising the advisory activities of Kevin J. Barto. As part of his supervisory responsibilities, Mr. Perrin, Jr. periodically reviews client accounts and communications with clients. Mr. Perrin, Jr. can be reached at #513/769-3131.