

SwitchPoint Financial Planning, LLC

**Form ADV Part 2B – Brochure
Supplement**

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For

Kyle David Wilhelm

Dated March 23, 2023

This brochure supplement provides information about James Rhead Sweeney that supplements the SwitchPoint Financial Planning, LLC (“SwitchPoint”) brochure. A copy of that brochure precedes this supplement. Please contact Kyle Wilhelm if the SwitchPoint brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Kyle Wilhelm is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2: Educational Background and Business Experience

Kyle David Wilhelm

Born: 1988

Educational Background

- 2010 – Bachelor of Business Administration: Finance, Western Michigan University

Business Experience

- 9/2021 – Present, SwitchPoint Financial Planning, CCO & Operations Manager
- 11/2020 – 8/2021, Integris Wealth Management, Operations Manager
- 1/2018 – 11/2020, Rock House Financial, CCO & Director of Operations
- 4/2015 – 12/2017, Rock House Financial, Analyst
- 8/2012 – 4/2015, Knox Capital Group, Analyst

Professional Designations, Licensing & Exams

- FINRA Series 65

Item 3: Disciplinary Information

No management person at SwitchPoint has ever been involved in an arbitration claim of any kind or been found liable in a civil, self-regulatory organization, or administrative proceeding.

Item 4: Other Business Activities

Kyle Wilhelm is not involved with outside business activities.

Item 5: Additional Compensation

Kyle Wilhelm does not receive any economic benefit from any person, company, or organization, in exchange for providing Clients advisory services through SwitchPoint.

Item 6: Supervision

Kyle Wilhelm, as Chief Compliance Officer of SwitchPoint, is responsible for supervision. They may be contacted at the phone number on this brochure supplement.