

SwitchPoint Financial Planning, LLC

# Form ADV Part 2B – Brochure Supplement

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*For*

**Grant Prescott Fuller**

Dated July 24, 2023

This brochure supplement provides information about Grant Fuller 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 Grant Fuller is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

# Item 2: Educational Background and Business Experience

## Grant Prescott Fuller

Born: 1987

### Educational Background

- 2010 – Bachelor of Science: Finance, Western Kentucky University

### Business Experience

- 7/2023 – Present, SwitchPoint Financial Planning, Wealth Advisor
- 6/2021 – 7/2023, Mariner Wealth Advisors, Wealth Advisor
- 11/2014 – 04/2021, Creative Planning, Wealth Manager
- 6/2014 – 11/2014, TD Ameritrade, Investment Consultant
- 12/2011 – 06/2014, Jefferson National Financial, Territory Manager

### Professional Designations, Licensing & Exams

**CFP (Certified Financial Planner)®:** The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with Clients. Currently, more than 71,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;

- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and Client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real-world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.  
Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:
  - Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
  - Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their Clients.  
CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

## 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

Grant Fuller receives income from real estate property rental. This activity accounts for less than 10% of time and income and does not create any conflicts of interest for clients.

Grant Fuller is a minority owner of a non-industry related small business. This activity accounts for less than 10% of time and income and does not create any conflicts of interest for clients.

## Item 5: Additional Compensation

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