

Item 1 - Cover Page

Linda Y. Leitz, PhD, CFP®, EA, CDFP



Peace of Mind Financial Planning, Inc.

7222 Commerce Center Drive
Suite 175
Colorado Springs, CO 80919

(719) 836-8181

March 27, 2024

This Brochure Supplement provides information about Linda Leitz that supplements the Form ADV Part 2A “firm brochure” of Peace of Mind Financial Planning, Inc. Please contact Linda Leitz at (719) 836-8181 if you did not receive the Peace of Mind Financial Planning, Inc. firm brochure or if you have any questions about the contents of this supplement or the firm brochure.

Additional information about Linda Leitz, CRD #2311643, is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience**Linda Y. Leitz, PhD, CFP®, EA, CDFA**

Year of Birth: 1956

EDUCATION:

PhD in Personal Financial Planning, Kansas State University, 2016

MBA from Southern Methodist University, 1987

BA in Business Administration from Principia College, 1979

EMPLOYMENT:Peace of Mind Financial Planning, Inc.
Founder and Co-Owner – August 2017 to presentIt's Not Just Money, Inc.
Founder and Co-Owner – Jan 1995 to December 2017**PROFESSIONAL DESIGNATIONS:**

Certified Financial Planner™ 1997

Certified Divorce Financial Analyst 1996

Enrolled Agent with the Internal Revenue Service 2001

PROFESSIONAL DESIGNATION DISCLOSURES:

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP® 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 88,000 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 CFP® Exam is comprehensive in scope and designed to assess a professional's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – (1) Complete at least three years (at least 6,000 hours) of full-time financial planning-related experience or (2) complete at least two years (at least 4,000 hours) of full-time financial planning-related experience while under the supervision of a CFP® professional; and
- Ethics – Agree to be bound by CFP Board's *Code of Ethics and Standards of 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 Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Code of Ethics and Standards of 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.

Linda also holds the Certified Divorce Financial Analyst® (CDFA®) designation. CDFA® professionals must develop their theoretical and practical understanding and knowledge of the financial aspects of divorce by completing a comprehensive course of study approved by the Institute for Divorce Financial Analysis. CDFA® professionals must have two years minimum experience in a financial or legal capacity prior to earning the right to use the CDFA® certification mark.

Item 3 - Disciplinary Information

Peace of Mind Financial Planning, Inc. is required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

No disclosure information is applicable to this Item.

Item 4 - Other Business Activities

Linda is the owner of Bright Leitz, LLC through which she publishes books, speaks publicly, and writes on a freelance basis.

Tax preparation is provided for some clients through this firm. Linda is an Enrolled Agent with the IRS.

Linda teaches part time as an adjunct or lecturer at Kansas State University. The courses taught are generally either in a CFP Certificate program or Personal Financial Planning degree program.

She also is involved in community and industry organizations on a volunteer basis.

Item 5 - Additional Compensation

Compensation for the above referenced activities varies and is insubstantial relative to her primary business focus, which is Peace of Mind Financial Planning, Inc. Clients are never required to engage Ms. Leitz for tax preparation services.

Item 6 - Supervision

Peace of Mind Financial Planning, Inc. has adopted, and periodically updates, a supervisory procedures manual. Linda Leitz is the Chief Compliance Officer, who reviews and monitors employee activity with respect to the rules and regulations. In addition, Peace of Mind Financial Planning, Inc. has adopted a Code of Ethics that requires each employee to act in the best interest of clients at all times. Should you have questions related to these activities, please contact Linda Leitz at (719) 836-8181.

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Danielle (“Dani”) R. Parris-Exline, AFC® , CFP®



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Additional information about Dani Parris-Exline, CRD #7285794, is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 - Educational Background and Business Experience**Danielle (“Dani”) R. Parris-Exline, AFC®, CFP®**

Year of Birth: 1973

EDUCATION:

MBA from Webster University, 2001

BA from University of Central Florida, 1997

EMPLOYMENT:

Peace of Mind Financial Planning, Inc.
Co-Owner – January 2023 to Present
Financial Advisor – April 2020 to Present

Wanderlust Financial Coaching
Owner and Coach – December 2018 to 10/2021

Harris Corporation
Human Resources Manager – September 2016 to September 2018

Envision Radiology
Human Resources Manager – April 2013 to September 2016

PROFESSIONAL DESIGNATIONS:

Accredited Financial Counselor® 2021

Certified Financial Planner™ 2022

PROFESSIONAL DESIGNATION DISCLOSURES:

The Accredited Financial Counselor®, AFC® designation is a specialty credential targeted to professionals interested in expanding accessibility to and improving equitability in financial counseling and education. The AFC® helps professionals better understand how diverse backgrounds, perspectives, and experiences impact individuals’ money behavior. An AFC® has the skills to assist individuals and families in the complex process of financial decision making.

The AFC® designation is a voluntary designation; no federal or state law or regulation requires financial planners to hold AFC® designation. Currently, more than 3,200 individuals have obtained AFC® designation in the United States.

To earn the AFC® credential, an individual must satisfactorily fulfill the following requirements:

- Education – To earn the AFC credential, all candidates must complete one of the following educational requirement pathways:
 - Financial Education Challenge - The financial education challenge pathway provides applicants who have completed college-level coursework that encompasses each of the AFC core competencies to apply that coursework toward AFC eligibility.
 - Professional Designation Challenge - The professional designation challenge pathway provides applicants who have achieved a professional designation in a related field to apply the knowledge assessed by that designation towards the required AFC core competencies.
 - Self-Paced Study - Complete the AFCPE Self-Paced Study Accredited Financial Counselor course.
 - Registered Education Program - The registered education program pathway allows applicants to apply knowledge gained from an accredited university that has pre-submitted its course content to AFCPE.
- Examination – Pass the AFC examination. Applicants are required to pass the AFC certification examination, developed to meet generally accepted psychometric principles, in order to demonstrate that they have the knowledge, skills and abilities to assist individuals and families in the complex process of financial decision making as encompassed by the AFC core competencies.
- Experience – Complete 1,000 hours of financial counseling experience; and
- Ethics – Agree to adhere to the AFCPE Code of Ethics. By attesting to the AFCPE Code of Ethics, applicants commit to personal and professional ethical action that avoids conflicts of interest, maintains confidentiality, and aims to establish a trusting, effective relationship with the client and community that is essential to the mission of the AFC professional’s work.

Individuals who obtain the designation must complete the following ongoing education and ethics requirements in order to maintain AFC® certification:

- Continuing Education – Complete 30 hours of continuing education units that are approved by AFCPE every two years; and
- Ethics – Earn 2 Ethics related CEUs every two years and agree to comply with the AFC Code of Ethics and Standards of Practice.

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No disclosure information is applicable to this Item.

Item 4 - Other Business Activities

Dani Parris-Exline is the owner of Exline Consulting LLC dba Wanderlust Financial Coaching. This entity is inactive and was founded to provide individual financial coaching (non-securities related) which is currently provided by Dani through Peace of Mind Financial Planning.

Item 5 - Additional Compensation

Compensation for the above referenced activities varies and is insubstantial relative to Dani's primary business focus, which is Peace of Mind Financial Planning, Inc.

Item 6 - Supervision

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