

Part 2B of Form ADV: *Brochure Supplement*

Martin J. Armbruster
609 Treybourne Drive, Ste B
Greenwood, IN 46142
317-449-2040

Treybourne Wealth Planners
Greenwood, Indiana 46142

March 31, 2019

This brochure supplement provides information about Martin J. Armbruster that supplements the Treybourne Wealth Planners brochure. You should have received a copy of that brochure. Please contact Martin J. Armbruster if you did not receive Treybourne Wealth Planners' brochure or if you have any questions about the contents of this supplement.

Additional information about Martin J. Armbruster is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational, Background and Business Experience

Full Legal Name: Martin J. Armbruster **Born:** 1953

Education: University of Notre Dame; BBA, Accounting; 1975

Business Experience

- Treybourne Wealth Planners (formerly Sherman & Armbruster, Inc. dba Treybourne Wealth Planners); President; from 12/1985 to Present
- Sherman & Armbruster LLP; Partner; from 12/1982 to 12/2018

Designations

Martin J. Armbruster has earned the following designation(s) and is in good standing with the granting authority. See definitions of the designations in the appendix.

- **CFP® - Certified Planning Board of Standards – 1982**
- **CPA - American Institute of Certified Public Accountants – 1978**
- **PFS - American Institute of Certified Public Accountants - 1995**

Item 3 Disciplinary Information:

Martin J. Armbruster has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

1. Martin J. Armbruster is not engaged in any other investment-related activities.
2. Martin J. Armbruster does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

B. Non-Investment-Related Activities

Martin J. Armbruster is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his or her time.

Item 5 Additional Compensation

Martin J. Armbruster does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6 Supervision

Supervisor: N/A

Title: President, Chief Compliance Officer (CCO)

Phone Number: 317-449-2040

As President and Chief Compliance Officer of Treybourne Wealth Planners, Martin Armbruster has responsibility for knowing, following, and overseeing the Company's policies and procedures. As President of the Company, he oversees Stephanie Willison, Timothy Voegele, Tami Ficara, Jessica Beaman, Carol Cooney, Tracy Bousky, and Chase Huang. As President, he has overall supervisory responsibility for the Company.

Treybourne Wealth Planners has adopted various procedures to implement the Company's policy, conducts reviews of internal controls to monitor and ensure the Company's supervision policy is observed, implemented properly and amended or updated, as appropriate.

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Stephanie Lynn Willison

609 Treybourne Drive, Ste B
Greenwood, IN 46142
317-449-2040

Treybourne Wealth Planners

Greenwood, Indiana 46142

March 31, 2019

This brochure supplement provides information about Stephanie Lynn Willison that supplements Treybourne Wealth Planners brochure. You should have received a copy of that brochure. Please contact Martin J. Armbruster if you did not receive Treybourne Wealth Planners' brochure or if you have any questions about the contents of this supplement.

Additional information about Stephanie Lynn Willison is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational, Background and Business Experience

Full Legal Name: Stephanie Lynn Willison **Born:** 1978

Education: University of Indianapolis; BS, Accounting; 1999

Business Experience

- Treybourne Wealth Planners (formerly Sherman & Armbruster, Inc., dba Treybourne Wealth Planners); Advisor; from 12/2010 to Present
- WealthPoint Advsiors, LLC; Owner, Vice President; from 10/2009 to 11/2010
- RJP Investment Advisors, LLP; Associate Vice President; from 10/1999 to 10/2009
- RJ Pile & Company, LLC; Staff Accountant; from 06/1999 to 10/2009

Designations

Stephanie Lynn Willison has earned the following designation(s) and is in good standing with the granting authority. See definitions of the designations in the appendix.

- **CFP® - Certified Planning Board of Standards - 2005**
- **CPA - American Institute of Certified Public Accountants – 2004**
- **PFS - American Institute of Certified Public Accountants - 2004**
- **AIF® - Accredited Investment Fiduciary – 2017**

Item 3 Disciplinary Information:

Stephanie Lynn Willison has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

1. Stephanie Lynn Willison is not engaged in any other investment-related activities.
2. Stephanie Lynn Willison does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

B. Non-Investment-Related Activities

Stephanie Lynn Willison is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his or her time.

Item 5 Additional Compensation

Stephanie Lynn Willison does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6 Supervision

Supervisor: Martin J. Armbruster

Title: President, CCO

Phone Number: 317-449-2040

Every employee has a responsibility for knowing and following the Company's policies and procedures. Every person in a supervisory role is also responsible for those individuals under his/her supervision. The President has overall supervisory responsibility for the Company.

Treybourne Wealth Planners has adopted various procedures to implement the Company's policy, conducts reviews of internal controls to monitor and ensure the Company's supervision policy is observed, implemented properly and amended or updated, as appropriate, which include the following:

- Designation of Chief Compliance Officer as responsible for implementing and monitoring the Company's compliance policies and procedures.
- An Annual Compliance meeting and on-going and targeted compliance training.
- Procedures for screening the background of potential new employees.
- Initial training of newly hired employees about the Company's compliance policies.
- Adoption of these written policies and procedures with statements of policy, designated persons responsible for the policy and procedures designed to implement and monitor the Company's policy.
- Annual review of the Company's policies and procedures by the Compliance Officer and senior management.
- Periodic reviews of employees' activities (ex: personal trading, emails).
- Annual written representations by employees as to understanding and abiding by the Company's policies.
- Supervisory reviews and sanctions for violations of the Company's policies or regulatory requirements.

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Timothy Eugene Voegele

609 Treybourne Drive, Ste B
Greenwood, IN 46142
317-449-2040

Treybourne Wealth Planners

Greenwood, Indiana 46142

March 31, 2019

This brochure supplement provides information about Timothy Eugene Voegele that supplements Treybourne Wealth Planners brochure. You should have received a copy of that brochure. Please contact Martin J. Armbruster if you did not receive Treybourne Wealth Planners' brochure or if you have any questions about the contents of this supplement.

Additional information about Timothy Eugene Voegele is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational, Background and Business Experience

Full Legal Name: Timothy Eugene Voegele **Born:** 1954

Education: Rose-Hulman Institute of Technology, B.S. Chem. Eng. 1977
Master of Business Administration, Indiana University 1984

Business Experience

- Treybourne Wealth Planners (formerly Sherman & Armbruster, Inc., dba Treybourne Wealth Planners); Advisor and Chief Investment Officer; from 11/2016 to Present
- Acuity Financial Advisors, LLC, Founder and Principal, 2010-2016
- Thurston, Springer, Miller, Herd and Titak, Investment Executive, 2009-2010
- Eli Lilly and Company, Engineering, Manufacturing, Human Resources and Finance positions 1977-2009

Designations

Timothy Eugene Voegele has earned the following designation(s) and is in good standing with the granting authority. See definitions of the designations in the appendix.

- **CFP® - Certified Planning Board of Standards - 2008**
- **CFA® – Chartered Financial Analyst, CFA Institute 2007**

Item 3 Disciplinary Information:

Timothy Eugene Voegele has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

1. Timothy Eugene Voegele is not engaged in any other investment-related activities.
2. Timothy Eugene Voegele does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

B. Non-Investment-Related Activities

Timothy Eugene Voegele is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his or her time.

Item 5 Additional Compensation

Timothy Eugene Voegele does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6 Supervision

Supervisor: Martin J. Armbruster

Title: President, CCO

Phone Number: 317-449-2040

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Treybourne Wealth Planners has adopted various procedures to implement the Company's policy, conducts reviews of internal controls to monitor and ensure the Company's supervision policy is observed, implemented properly and amended or updated, as appropriate, which include the following:

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- Annual review of the Company's policies and procedures by the

Compliance Officer and senior management.

- Periodic reviews of employees' activities (ex: personal trading, emails).
- Annual written representations by employees as to understanding and abiding by the Company's policies.
- Supervisory reviews and sanctions for violations of the Company's policies or regulatory requirements.

Part 2B of Form ADV: *Brochure Supplement*

Teresa M. Bousky

125 S. Clark Street
Chicago, IL 60603
312-300-0800

Treybourne Wealth Planners

Greenwood, Indiana 46142

March 31, 2019

This brochure supplement provides information about Teresa M. Bousky that supplements the Treybourne Wealth Planners brochure. You should have received a copy of that brochure. Please contact Martin J. Armbruster if you did not receive Treybourne Wealth Planners' brochure or if you have any questions about the contents of this supplement.

Additional information about Teresa M. Bousky is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational, Background and Business Experience

Full Legal Name: Teresa M. Bousky **Born:** 1961

Education: BS, Accounting; University of Illinois, Champaign-Urbana; 1983; Masters of Management, Kellogg Graduate School of Mgt of Northwestern Univ, 1995

Business Experience

- Treybourne Wealth Planners; Lead Advisor; from 03/15/2019 to Present
- Private Vista (Formerly Financial Strategy Network, LLC); Lead Advisor, from 7/1/2002 to 3/15/2019.
- Midas International and its parent company IC Industries; Strategic Planning, Controller of Company Retail; Corporate Financial Reporting; Internal Audit.

Designations

Teresa M. Bousky has earned the following designation(s) and is in good standing with the granting authority. See definitions of the designations in the appendix.

- **CFP® - Certified Planning Board of Standards - 2002**
- **CPA - American Institute of Certified Public Accountants - 1983**
- **PFS - American Institute of Certified Public Accountants - 2003**

Item 3 Disciplinary Information:

Teresa M. Bousky has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

1. Teresa M. Bousky is not engaged in any other investment-related activities.
2. Teresa M. Bousky does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

B. Non-Investment-Related Activities

Teresa M. Bousky is an insurance agent licensed to sell life, health, long-term care and disability insurance as well as annuities and may engage in product sales with our clients, for which she will receive additional compensation. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under Treybourne Wealth Planners. This activity accounts for approximately 5% of her time.

Item 5 Additional Compensation

Teresa M. Bousky does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6 Supervision

Supervisor: Martin J. Armbruster

Title: President, CCO

Phone Number: 317-449-2040

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- Initial training of newly hired employees about the Company's compliance policies.
- Adoption of these written policies and procedures with statements of policy,

designated persons responsible for the policy and procedures designed to implement and monitor the Company's policy.

- Annual review of the Company's policies and procedures by the Compliance Officer and senior management.
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Part 2B of Form ADV: *Brochure Supplement*

Chase Ying Huang

125 S. Clark Street
Chicago, IL 60603
312-300-0800

Treybourne Wealth Planners

Greenwood, Indiana 46142

March 31, 2019

This brochure supplement provides information about Chase Ying Huang that supplements Treybourne Wealth Planners brochure. You should have received a copy of that brochure. Please contact Martin J. Armbruster if you did not receive Treybourne Wealth Planners' brochure or if you have any questions about the contents of this supplement.

Additional information about Chase Ying Huang is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational, Background and Business Experience

Full Legal Name: Chase Ying Huang **Born:** 1976

Education: Northeastern Illinois University; BS, Accounting and Finance; 2008

Business Experience

- Treybourne Wealth Planners; Advisor; from 03/31/2019 to Present
- Private Vista LLC; from 09/2011 to 3/30/2019
- Trinity Financial Advisors LLC; from 07/2004 to 09/2011

Designations

Chase Ying Huang has earned the following designation(s) and is in good standing with the granting authority. See definitions of the designations in the appendix.

- **CFP® - Certified Planning Board of Standards - 2013**

Item 3 Disciplinary Information:

Chase Ying Huang has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

1. Chase Ying Huang is not engaged in any other investment-related activities.
2. Chase Ying Huang does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

B. Non-Investment-Related Activities

Chase Ying Huang is an insurance agent licensed to sell life, health, long-term care and disability insurance as well as annuities and may engage in product sales with our clients, for which she will receive additional compensation. Any commissions received through life or health insurance sales do not offset advisory fees the client may pay for advisory services under Treybourne Wealth Planners. This activity accounts for approximately 5% of her time.

Item 5 Additional Compensation

Chase Ying Huang does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6 Supervision

Supervisor: Martin J. Armbruster

Title: President, CCO

Phone Number: 317-449-2040

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APPENDIX: DEFINITION OF DESIGNATIONS

CFP® - Certified Planning Board of Standards

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 62,000 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, administered in 10 hours over a two-day period, 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 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.

Certified Public Accountant (CPA)

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination.

In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two-year period or 120 hours over a three-year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous *Code of Professional Conduct* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's *Code of Professional Conduct* within their state accountancy laws or have created their own.

Personal Financial Specialist (PFS)

The PFS credential demonstrates that an individual has met the minimum education, experience and testing required of a CPA in addition to a minimum level of expertise in personal financial planning. To attain the PFS credential, a candidate must hold an unrevoked CPA license, fulfill 3,000 hours of personal financial planning business experience, complete 80 hours of personal financial planning CPE credits, pass a comprehensive financial planning exam and be an active member of the AICPA.

A PFS credential holder is required to adhere to AICPA's *Code of Professional Conduct* and is encouraged to follow AICPA's *Statement on Responsibilities in Financial Planning Practice*. To maintain their PFS credential, the recipient must complete 60 hours of financial planning CPE credits every three years. The PFS credential is administered through the AICPA.

Accredited Investment Fiduciary (AIF®)

To obtain the AIF® designation, your advisor had to complete either a self-study module of a combination of a classroom and self-study module. The advisor then had to pass a closed-book, proctored examination to complete the course of study. To maintain the designation, your advisor completes six hours of continuing education every year.

Chartered Financial Analyst (CFA®)

The Chartered Financial Analyst (CFA) charter is a globally respected, graduate level investment credential established in 1962 and awarded by CFA Institute—the largest global association of investment professionals.

There are currently more than 120,000 CFA charter holders working in 135 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charter holders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

Global Recognition

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charter holders—often making the charter a prerequisite for employment.

Additionally, regulatory bodies in 19 countries recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

Comprehensive and Current Knowledge

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

To learn more about the CFA charter, visit www.cfainstitute.org