



# BOYD WEALTH MANAGEMENT

## **Brian A. Boyd**

Boyd Wealth Management, LLC

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This brochure supplement provides information about Brian Boyd that supplements our brochure. You should have received a copy of that brochure. Please contact Kait Garlick if you did not receive Boyd Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Brian Boyd is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD #3091368.

## **Item 2: Educational Background & Business Experience**

**Brian A. Boyd**

**Year of Birth:** 1974

### **Educational Background:**

- 1996: California State University – Sacramento; Bachelor of Science in Business Administration – Finance

### **Business Background:**

- 05/2018 – Present Boyd Wealth Management, LLC; Managing Member & Investment Adviser Representative
- 07/1998 – 05/2018 Northwestern Mutual; Agent / Wealth Management Advisor

### **Exams, Licenses & Other Professional Designations:**

- 2016: CERTIFIED FINANCIAL PLANNER™ (CFP®)
- 2008: Chartered Financial Consultant® (ChFC®)
- 2007: Series 7 & 66 Exams
- 1998: Series 6 & 63 Exams
- 1995: Insurance Licensed

The CFP® certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam and agreeing to be bound by the CFP® board's *Standard of Professional Conduct*. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the *Standards of Professional Conduct*.

The ChFC® designation is offered by The American College. Designation holders are required to serve clients with the highest level of professionalism. The authority to use the ChFC® mark is granted by the Certification Committee of the Board of Trustees of The American College, and that privilege is contingent on adherence to strict ethical guidelines. All ChFC® advisors are required to do the same for clients that they would do for themselves in similar circumstances, the standard of ethical behavior most beneficial for their clients. Each ChFC® has taken 9 or more college-level courses on all aspects of financial planning. The average study time for the program is over 400 hours, and advisors frequently spend years earning this coveted distinction. Each ChFC® must also complete a minimum of 30 hours of continuing education every two years and must meet extensive experience requirements to ensure that you get the professional financial advice you need.

**Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

**Item 4: Other Business Activities**

Mr. Boyd is a licensed insurance agent/broker. He may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Boyd, as a fiduciary, will act in the client's best interest.

**Item 5: Additional Compensation**

Brian Boyd does not receive any economic benefit from any person, company, or organization, other than Boyd Wealth Management, LLC in exchange for providing clients advisory services through Boyd Wealth Management, LLC.

**Item 6: Supervision**

As a representative of Boyd Wealth Management, LLC, Brian Boyd is supervised by Kait Garlick, the firm's Chief Compliance Officer. Kait Garlick is responsible for ensuring that Brian Boyd adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Kait Garlick is (916) 367-0578.