

**Item 1 Cover Page**

A.

**Brian D. Deal**

Almanack Investment Partners, LLC

ADV Part 2B, Brochure Supplement  
Dated: February 1, 2021

Contact: James Judge, Chief Compliance Officer  
656 E Swedesford Road  
Suite 301  
Wayne, PA 19087

B.

**This Brochure Supplement provides information about Brian D. Deal that supplements the Almanack Investment Partners, LLC Brochure; you should have received a copy of that Brochure. Please contact James Judge, Chief Compliance Officer, if you did *not* receive Almanack Investment Partners, LLC's Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Brian D. Deal is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

**Item 2 Education Background and Business Experience**

Brian D. Deal was born in 1978. Mr. Deal graduated from Eastern Connecticut State University with a Bachelor of Science degree in Psychology. Prior to becoming an investment advisor representative with Almanack Investment Partners, LLC in 2020, Mr. Deal served as an investment advisor at Elevage Partners LLC, Bradway Financial LLC, and an executive financial planner at Tittmann & Rusch, LLC. Mr. Deal has also served as a personal financial counselor to military members and their families since 2009. Mr. Deal served in the United States Marine Corps from 1996 to 2004.

Mr. Deal has been a CERTIFIED FINANCIAL PLANNER™ since 2010. The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (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 currently 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 education planning, risk management and insurance planning, investment planning, tax planning, retirement savings and income planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 6 hours, 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 currently 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

None.

### Item 4 Other Business Activities

- A. **Licensed Insurance Agent**. Mr. Deal, in his individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Mr. Deal to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Mr. Deal that a client purchase an insurance commission product presents a conflict of interest, as the receipt of commissions may provide an incentive to recommend insurance products based on commissions to be received, rather than based on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Deal. Clients are reminded that they may purchase insurance products recommended by Mr. Deal through other, non-affiliated insurance agents. The Registrant's Chief Compliance Officer, James Judge, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.
- B. **Licensed Real Estate Agent**. Mr. Deal, in his individual capacity, is a licensed real estate agent, and may represent clients or recommend other insurance agents on a commission or fee basis. **Conflict of Interest:** The recommendation by Mr. Deal that a client engage Mr. Deal for real estate representation or assistance in finding other agents for representation presents a conflict of interest, as the receipt of real estate commissions may provide an incentive, rather than based on a particular client's need. No client is under any obligation to receive real estate services from Mr. Deal. Clients are reminded that they may find real estate representation through other, non-affiliated real estate agents. The Registrant's Chief Compliance Officer, James Judge, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.
- C. **Financial Counselor / Military Financial Counselor**. Mr. Deal, in his individual capacity, serves as a personal financial counselor to individuals, military members and their families. Mr. Deal facilitates financial workshops & seminars, as well as working with individuals to bolster their financial situation and increase our nation's military readiness.

## **Item 5 Additional Compensation**

None.

## **Item 6 Supervision**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("*Act*"). The Registrant's Chief Compliance Officer, James Judge, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or solicitor of the Registrant have any questions regarding the applicability/relevance of the *Act*, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Mr. Judge at (484) 580-2277.