This document, which includes a summary of hyperlinks and access to other materials referenced in our Form CRS [Published: June 30, 2020], is intended to support Form CRS by providing convenient access to additional materials and more detailed information concerning the topics discussed within our Customer Relationship Summary.

FORM CRS I REFERENCED HYPERLINKS

INVESTOR.GOV/CRS

Provides free and simple tools to research firms and financial professionals for the purpose of giving retail investors the ability to compare the differences in broker-dealer costs and services and investment adviser costs and services.

FINANCIALCOACHGROUP.COM

See our website for detailed descriptions of the advisory services we offer through Financial Coach, which are intended for individuals and couples who are retired or approaching retirement, (usually age 55 years and older).

THENEWWEALTHPROJECT.COM

See our website for detailed descriptions of the advisory services we offer through New Wealth Project, which are intended for young families and emerging professionals, (usually ages 30-55 years).

ADVISERINFO.SEC.GOV

The Investment Adviser Public Disclosure (IAPD) website provides access to information about investment adviser firms registered with the SEC and most state-registered investment adviser firms. The most current version of our Investment Adviser Firm Summary can be accessed through the IAPD directly at https://adviserinfo.sec.gov/firm/summary/170478

FORM ADV PART 1

Primary uniform form used by investment advisers to register with both the Securities Exchange Commission (SEC) and state securities authorities. Part 1 provides details about our business, ownership, clients, employees, business practices, affiliations, and any disciplinary events. The most current version of this brochure is maintained on and accessible through the IAPD.

FORM ADV PART 2

Part 2A ("Firm Brochure") contains information regarding the types of advisory services we offer, our advisory fee schedule, disciplinary information, and conflicts of interest.

FORM ADV PART 2B

Part 2B ("individual brochure supplements") contain information regarding the educational and business background of our Firm's Investment Adviser Representatives and other management and key advisory personnel who directly provide investment advice to clients. The most current version of this brochure supplement will be provided upon request.

FORM CRS I ADDITIONAL SUPPORT REFERENCES

ITEM 2. Relationships and Services

What investment services and advice can you provide me?

Reference our Form ADV Part 2A, **Item 4**: Advisory Business, **Item 7**: Types of Clients, and **Item 8**: Methods of Analysis, Investment Strategies, and Risk of Investment Loss for more **detail concerning our relationship and the services we offer.**

The following materials contain more detailed information **regarding our portfolio management services.**

- Financial Coach Investment Philosophy
- New Wealth Project Investment Philosophy
- Evidence Based Investing: A Guide to Investment Basics

The items below provide more information **regarding our various advisory service offerings.**

- Financial Coach Retirement Gameplan
- Financial Coach Supernova Comprehensive Service Model
- New Wealth Project – The Project
- New Wealth Project – Elite Engagement

ITEM 3. Fees, Costs, Conflicts and Standards of Conduct

What fees will I pay? What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have? How do your financial professionals make money?

Reference our Form ADV Part 2A, **Item 5**: Fees and Compensation, **Item 10**: Other Financial Industry Activities and Affiliations, and **Item 11**: Code of Ethics, Participation or Interest in Client Transactions and Personal Trading for more **detail regarding our fees, costs, conflicts, and standards of conduct.**