



SAILER FINANCIAL, LLC

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March 12, 2018

This Brochure Supplement (Form ADV Part 2B) provides information about Jeremy P. Hutzel (“Hutzel”), Andy Michael (“Michael”), Jenny E. Wilson (“Wilson”) and Pamela N. P. Talley (“Talley”), investment advisory representatives of Sailer Financial, LLC. The information contained herein supplements the Sailer Financial, LLC Brochure (Form ADV Part 2A). You should have received a copy of that Brochure. Please contact Jeremy Hutzel, President, if you did not receive Sailer Financial, LLC’s Brochure or if you have any questions about the contents of this Brochure Supplement.

Additional information about Jeremy Hutzel, Andy Michael, Jenny Wilson and Pamela Talley is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2- Educational Background and Business Experience

Jeremy P. Hutzel, CFP®, CFA

Born: 1984

Education

- Belmont University, Nashville, TN – B.B.A.in Finance, 2006
- Boston University, Center for Professional Education – Certificate in Financial Planning, 2008

Business Background

- Sailer Financial, LLC, President, Advisory Representative – 2/2016 to Present
- Securities Service Network, Inc., Registered Representative – 07/2010 to Present
- Sailer Financial, LLC, Vice-President, Advisory Representative – 12/2009 to 02/2016
- Institutional Capital Management, Registered Representative – 01/2010 to 7/2010
- Securities Service Network, Inc., Licensed Assistant – 07/2008 to 12/2009
- Sailer Financial, LLC, Investment/Portfolio Specialist – 05/2006 to 11/2009

Certifications

- CERTIFIED FINANCIAL PLANNER™ [CFP®], 2008
 - Chartered Financial Analyst [CFA], 2011

The CERTIFIED FINANCIAL PLANNER™ or CFP® is a professional certification program granted in the United States by the 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 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;
 - 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. More information on the CFP® certification is available at www.cfp.net.

The Charter Financial Analyst (CFA) designation is an international professional certification issued by the CFA Institute (formerly AIMR). Becoming a CFA® charterholder requires completion of a graduate-level self-study program offered through the CFA Institute and completion of three sequential examinations. The CFA Institute has stated that the average candidate may need approximately 250 hours of study for each of the three levels. In addition, qualification as a CFA® charterholder requires:

- A bachelor's degree from an accredited institution or equivalent education or work experience.
- 48 months of acceptable professional work experience in the investment decision-making process.
- Fulfillment of local society requirements, which vary by society.
- Entry into a Member's Agreement, a Professional Conduct Statement and any additional documentation requested by CFA Institute.

CFA charterholders are also obligated to adhere to a strict Code of Ethics and Standards governing their professional conduct. More information on the CFA charter is available at www.cfainstitute.org.

Jenny E. Wilson

Born: 1980

Education

- Bethel College, McKenzie, TN – B.S. Degree in Management and Organizational Development

Business Background

- Sailer Financial, LLC, Advisory Representative – 2/2014 to Present
- Securities Service Network, Inc., Licensed Assistant – 07/2010 to Present
- Sailer Financial, LLC, Financial Planning Associate – 08/2008 to Present
- Institutional Capital Management, Registered Representative – 01/2010 to 7/2010
- Securities Service Network, Inc., Licensed Assistant – 08/2008 to 12/2009
- SunTrust Investment Services, Inc., Wealth Management Associate – 7/2008 to 8/2008

Certifications

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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 Professional Conduct*, to maintain competence and keep up with developments in the financial planning field;
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Andy Michael, CFA

Born: 1988

Education

- Middle Tennessee State University, Murfreesboro, TN – Bachelors of Business Administration in Finance, Magna Cum Laude, 2010

Business Background

- Sailer Financial, LLC, Advisory Representative – 1/2016 to Present
- Sailer Financial, LLC, Wealth Management Associate – 4/2015 to Present
- U.S. Trust, Portfolio Manager Associate – 2011 to 4/2015
- U.S. Trust, Health Care Sector REIT Analyst – 2014 to 4/2015
- U.S. Trust, Client Sales and Service Officer – 2009 to 2011

Certifications

- Chartered Financial Analyst [CFA], 2015

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- A bachelor's degree from an accredited institution or equivalent education or work experience.

- 48 months of acceptable professional work experience in the investment decision-making process.
- Fulfillment of local society requirements, which vary by society.
- Entry into a Member's Agreement, a Professional Conduct Statement and any additional documentation requested by CFA Institute.

CFA charterholders are also obligated to adhere to a strict Code of Ethics and Standards governing their professional conduct. More information on the CFA charter is available at www.cfainstitute.org.

Pamela N. P. Talley, CFP®

Born: 1988

Education

- University of Georgia, Athens, GA– Graduated in 2013 with a B.S.F.C.S. in Family Financial Planning

Business Background

- Sailer Financial, LLC, Advisory Representative – 1/2017 to Present
- Securities Service Network, Inc., Licensed Assistant – 08/2016 to Present
- Sailer Financial, LLC, Client Service Specialist – 06/2016 to Present
- Anthony Smith Advisors, Inc., Client Care Coordinator – 12/2014 to 05/2016
- E*TRADE Financial Corporation, Senior Financial Services Representative – 09/2014 to 12/2014

Certifications

- CERTIFIED FINANCIAL PLANNER™ [CFP®], 2016

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Item 3- Disciplinary Information

Investment adviser representatives are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each person providing investment advice.

- No information is applicable to this Item for Jeremy Hutzel.
- No information is applicable to this Item for Jenny Wilson.
- No information is applicable to this Item for Andy Michael.
- No information is applicable to this Item for Pamela Talley.

Item 4- Other Business Activities

Hutzel is a registered representative of Securities Service Network, Inc. and may recommend securities for which he receives commissions.

Wilson is a licensed assistant of Securities Service Network, Inc. and may recommend securities for which she receives commissions.

Talley is a licensed assistant of Securities Service Network, Inc. and may recommend securities for which she receives commissions.

Sailer Financial, LLC (“SF”) is a licensed insurance company and Hutzell and Wilson serve as insurance agents. Hutzell and Wilson may recommend insurance products for which they receive compensation.

Hutzell’s, Wilson’s, and Talley’s work as registered representatives and Hutzell’s and Wilson’s work as insurance agents creates a potential conflict of interest because there is an incentive to recommend one product over another if the compensation arrangement for the recommended product is more favorable. However, Clients are under no obligation to act upon any recommendations or to effect any transactions through Hutzell, Wilson, or Talley if they decide to follow such recommendations. As fiduciaries, Hutzell, Wilson and Talley endeavor to place Client interests first and foremost when making recommendations.

Item 5- Additional Compensation

Hutzell does not receive any compensation other than that disclosed above.

Michael does not receive any compensation other than that disclosed above.

Wilson does not receive any compensation other than that disclosed above.

Talley does not receive any compensation other than that disclosed above.

Item 6 - Supervision

Sailer Financial, LLC has appointed a Chief Compliance Officer who is responsible for the overall supervision of the firm, including the supervision of the investment advisory representatives named in this Brochure Supplement. The Chief Compliance Officer is Jeremy Hutzell. Mr. Hutzell implements policies and procedures to ensure compliance with industry rules and regulations. He maintains required books and records to monitor the investment advice and recommendations made on behalf of the firm. SF has a specific Code of Ethics that applies to all employees. Mr. Hutzell implements procedures to help ensure that employees comply with the firm’s Code of Ethics. Mr. Hutzell can be reached at 615-370-1253.