

Trust Present

THE PLANNED APPROACH

Trust Future

Stephanie Guerin

The Planned Approach, Inc.

420 W. 98th Street, Ste. 1
Kansas City, MO 64114
816-941-0098

www.theplannedapproach.com

June 29, 2020

Form ADV, Part 2B

The Brochure Supplement provides information about Stephanie Guerin, Kelly Hokanson and Staci Peterson that supplements The Planned Approach, Inc.'s Brochure. You should have received a copy of the Brochure. Please contact Stephanie Guerin, Chief Compliance Officer, if you did not receive The Planned Approach's brochure or if you have any questions about the contents of this supplement.

Additional information about Stephanie Guerin, Kelly Hokanson and Staci Peterson is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Stephanie Guerin

Born: 1973

Post-Secondary Education:

CFP Board of Standards, Denver, Colorado. Certified Financial Planner®, 2001
University of Kansas, Lawrence, Kansas. Bachelor of Arts Degree, 1996
Successfully completed the securities licenses: Series 7, 24, 66
Certified Financial Planner (CFP®) *
Insurance Licenses in Life and Health

Recent Business Experience:

The Planned Approach, Inc. Partner, October, 2002 to Present
Sunset Financial Services, Inc. Registered Representative, Registered Principal, Investment Adviser Representative. March 1999 to March 2013.

*Stephanie passed the CFP® exam in 2001.

Minimum Qualifications for the Certified Financial Planner (CFP®) Designation

Accredited by the National Commission for Certifying Agencies, this designation is issued by the Certified Financial Planner Board of Standards, Inc. (CFPBS) and is granted to individuals who meet the following prerequisites: (1) meet the education requirement, (2) possess a bachelor's degree from an accredited college or university, (3) pass the CFP® Certification Examination, (4) have at least three years of full-time work experience in personal financial planning, and (5) pass the CFPBS Fitness Standards for Candidates and Registrants and Background Check. The education requirement can be met by completing a CFPBS registered education program or by applying for challenge status based on certain degrees or credentials. Once the initial CFP® designation is issued, the CFP® holder is required to complete 30 hours of continuing education every two years and must meet other standards administered by the CFPBS.

Item 3 Disciplinary Information

Stephanie Guerin has no reportable legal or disciplinary events to disclose.

Item 4 Other Business Activities

Ms. Guerin holds an insurance license to sell limited insurance products. It is anticipated that a small portion, less than 5% of her time, will be spent providing these insurance products. She may receive compensation from selling insurance products and therefore receive economic benefit for this activity. This activity may create a conflict of interest with clients. However, since this activity represents less than 5% of her time and income, it is presumed not to be substantial.

Item 5 Additional Compensation

Stephanie Guerin does not receive any economic benefit for providing advisory services beyond the scope of The Planned Approach, Inc.

Item 6 Supervision

Stephanie Guerin is supervised through a compliance program designed to prevent and detect violations of federal and state securities laws. Compliance supervision includes review of portfolios, review of investment policy statements, review of advisory agreements, review of emails, personal transactions and portfolio trading. Supervision is conducted by the Chief Operations Officer, Staci Peterson, 816-941-0098.

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Kelly Hokanson

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Item 2 Educational Background and Business Experience

Kelly Hokanson

Born: 1970

Post-Secondary Education:

CFP Board of Standards, Denver, Colorado. Certified Financial Planner®, 2007
University of Missouri Kansas City, Kansas City, Missouri. Master's of Education, 1997
University of Kansas, Lawrence, Kansas. Bachelor of Social Welfare, 1992
Successfully completed the securities licenses: Series 6, 7, 63, 65
Certified Financial Planner (CFP®) *
Insurance Licenses in Life and Health

Recent Business Experience:

The Planned Approach, Inc. Partner, October, 2002 to Present
Sunset Financial Services, Inc. Registered Representative, Investment Adviser Representative.
November 2000 to March 2013.

*Kelly passed the CFP® exam in March, 2007.

Minimum Qualifications for the Certified Financial Planner (CFP®) Designation

Accredited by the National Commission for Certifying Agencies, this designation is issued by the Certified Financial Planner Board of Standards, Inc. (CFPBS) and is granted to individuals who meet the following prerequisites: (1) meet the education requirement, (2) possess a bachelor's degree from an accredited college or university, (3) pass the CFP® Certification Examination, (4) have at least three years of full-time work experience in personal financial planning, and (5) pass the CFPBS Fitness Standards for Candidates and Registrants and Background Check. The education requirement can be met by completing a CFPBS registered education program or by applying for challenge status based on certain degrees or credentials. Once the initial CFP® designation is issued, the CFP® holder is required to complete 30 hours of continuing education every two years and must meet other standards administered by the CFPBS.

Item 3 Disciplinary Information

Kelly Hokanson has no reportable legal or disciplinary events to disclose.

Item 4 Other Business Activities

Ms. Hokanson holds an insurance license to sell limited insurance products. It is anticipated that a small portion, less than 5% of her time, will be spent providing these insurance products. She may receive compensation from selling insurance products and therefore receive economic benefit for this activity. This activity may create a conflict of interest with clients. However, since this activity represents less than 5% of her time and income, it is presumed not to be substantial.

Item 5 Additional Compensation

Ms. Hokanson does not receive any economic benefit for providing advisory services beyond the scope of The Planned Approach, Inc.

Item 6 Supervision

Kelly Hokanson is supervised through a compliance program designed to prevent and detect violations of federal and state securities laws. Compliance supervision includes review of portfolios, review of investment policy statements, review of advisory agreements, review of emails, personal transactions and portfolio trading. Supervision is conducted by the Chief Compliance Officer, Stephanie Guerin, and Chief Operations Officer, Staci Peterson, 816-941-0098.

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Staci Peterson

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Additional information about Stephanie Guerin, Kelly Hokanson and Staci Peterson is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Staci Peterson

Born: 1971

Post-Secondary Education:

University of Missouri at Kansas City, Kansas City, Missouri. Bachelors of Science in Accounting, 1996

Successfully completed the Certified Public Accountant exam, 2000

Successfully completed the securities licenses: Series 7, 66

Insurance Licenses in Life and Health

Recent Business Experience:

The Planned Approach, Inc. Partner, July 2010 to Present

Hermes Landscaping, Inc., Kansas City, Missouri. Special Projects Accountant, February 2006 to July 2010

American Century Investments, Kansas City, Missouri. Senior Corporate Reporting Specialist, September 1999 to December 2005.

Item 3 Disciplinary Information

Staci Peterson has no reportable legal or disciplinary events to disclose.

Item 4 Other Business Activities

Ms. Peterson holds an insurance license to sell limited insurance products. It is anticipated that a small portion, less than 5% of her time, will be spent providing these insurance products. She may receive compensation from selling insurance products and therefore receive economic benefit for this activity. This activity may create a conflict of interest with clients. However, since this activity represents less than 5% of her time and income, it is presumed not to be substantial.

Item 5 Additional Compensation

Ms. Peterson does not receive any economic benefit for providing advisory services beyond the scope of The Planned Approach, Inc.

Item 6 Supervision

Staci Peterson is supervised through a compliance program designed to prevent and detect violations of federal and state securities laws. Compliance supervision includes review of portfolios, review of investment policy statements, review of advisory agreements, review of emails, personal transactions and portfolio trading. Supervision is conducted by the Chief Compliance Officer, Stephanie Guerin, 816-941-0098.