

Adam F. Cmejla, CFP®, CMFC®

Integrated Planning & Wealth Management, LLC

**11495 N. Pennsylvania Street
Suite 120
Carmel, IN 46032**

Telephone: 317-706-4748

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**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Adam F. Cmejla that supplements the Integrated Planning & Wealth Management, LLC brochure. You should have received a copy of that brochure. Contact us at 317-706-4748 if you did not receive Integrated Planning & Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Adam F. Cmejla (CRD # 5454609) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Adam F. Cmejla, CFP®, CMFC®

Year of Birth: 1982

Formal Education After High School:

- University of Wisconsin-Green Bay, BS Human Biology, 9/2001 - 5/2007

Business Background:

- Integrated Planning & Wealth Management, LLC, Chief Compliance Officer/Investment Adviser Representative, 1/2017 - Present
- Integrated Planning & Wealth Management, LLC, Managing Member, 11/2011 - Present
- Integrated Consulting & Advisory Solutions, LLC, Owner, 9/2014 - Present
- Cambridge Investment Research, Inc., Investment Adviser Representative, 12/2011 - Present
- Cambridge Investment Research, Inc., Registered Representative, 12/2011 - 1/2017
- Various Insurance Carriers, Agent, 4/2008 - Present
- Waddell & Reed, Financial Advisor, 3/2008 - 12/2011
- Baxter Pharmaceutical Solutions, Quality Assurance Associate, 7/2007 - 3/2008
- BioLife Plasma Services, Phlebotomist, 2/2005 - 7/2007

Certifications: **CFP®, CMFC®**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP® (with flame design) marks (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 63,000 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; 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.

Chartered Mutual Fund Counselor® (CMFC®)

The CMFC® Program is the only industry-recognized mutual fund designation. It is the result of collaboration between the College for Financial Planning® and the Investment Company Institute (ICI), the primary trade association for the mutual fund industry. A nine-module program must be completed by graduates, with an examination given by the College for Financial Planning®. A code of ethics must be followed. Applicants must comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct and Terms and Conditions. Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning®'s review of matters either self-disclosed or which are discovered by the College that are required to be disclosed. Continued use of the CMFC® designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the CMFC® designation by completing 16 hours of continuing education, reaffirming to abide by the Standards of Professional Conduct, and self disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Adam F. Cmejla has no required disclosures under this item.

Item 4 Other Business Activities

Adam F. Cmejla is a registered investment adviser of Cambridge Investment Research, Inc. When appropriate, Mr. Cmejla may recommend that you use the investment advisory services of Cambridge Investment Research, Inc. If you utilize the advisory services of Mr. Cmejla through Cambridge Investment Research, Inc., he may receive additional fees or other compensation in his capacity as an investment adviser representative. These fees would be in addition to any fees charged for the advisory services provided through Integrated Planning & Wealth Management, LLC.

Adam F. Cmejla is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. Cmejla for insurance related activities. This presents a conflict of interest because Mr. Cmejla may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Adam F. Cmejla is owner of Integrated Consulting & Advisory Solutions, LLC, a business that provides workflow and CRM systems to other financial services firms to help them increase efficiency. Mr. Cmejla's duties as the owner of Integrated Consulting & Advisory Solutions, LLC does not create a conflict of interest to his provision of advisory services through Integrated Planning & Wealth Management, LLC.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Cmejla's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Integrated Planning & Wealth Management, LLC's firm brochure for additional disclosures on this topic.

Item 6 Supervision

As the Managing Member and Chief Compliance Officer of Integrated Planning & Wealth Management, LLC, Adam F. Cmejla supervises the advisory activities of himself and our firm. Adam F. Cmejla can be reached at 317-706-4748.

Item 7 Requirements for State Registered Advisers

Adam F. Cmejla does not have any reportable arbitration claims, has not been found liable in a reportable civil, self-regulatory organization or administrative proceeding, and has not been the subject of a bankruptcy petition.