FORM ADV PART 2A
DISCLOSURE BROCHURE

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This brochure provides information about the qualifications and business practices of Dynamic Legacy Planning LLC. Being registered as an investment adviser does not imply a certain level of skill or training. If you have any questions about the contents of this brochure, please contact us at 317-477-7283. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission, or by any state securities authority.

Additional information about Dynamic Legacy Planning LLC (CRD #323407) is available on the SEC's website at www.adviserinfo.sec.gov

March 07, 2023

Item 2: Material Changes

Annual Update

The Material Changes section of this brochure will be updated annually or when material changes occur since the previous release of the Firm Brochure.

Material Changes since the Last Update

Dynamic Legacy Planning LLC has not yet filed an annual updating amendment to this Form ADV Part 2A. Therefore, there are no material changes to report.

Full Brochure Available

This Firm Brochure being delivered is the complete brochure for the Firm.

Item 3: Table of Contents

Form ADV – Part 2A – Firm Brochure

Item 4: Advisory Business

Firm Description

Dynamic Legacy Planning LLC ("DLP") was founded in 2021. Jason C. White is 100% owner and Chief Compliance Officer.

Types of Advisory Services

ASSET MANAGEMENT

DLP offers discretionary and non-discretionary asset management services to advisory Clients. DLP will offer Clients ongoing asset management services through determining individual investment goals, time horizons, objectives, and risk tolerance. Investment strategies, investment selection, asset allocation, portfolio monitoring and the overall investment program will be based on the above factors.

Discretionary

When the Client provides DLP discretionary authority the Client will sign a limited trading authorization or equivalent. DLP will have the authority to execute transactions in the account without seeking Client approval on each transaction.

Non-Discretionary

When the Client elects to use DLP on a non-discretionary basis, DLP will determine the securities to be bought or sold and the amount of the securities to be bought or sold. However, DLP will obtain prior Client approval on each and every transaction before executing any transaction.

FINANCIAL PLANNING AND CONSULTING

Comprehensive Financial Planning

Comprehensive financial planning services include a comprehensive evaluation of an investor's current and future financial state and will be provided by using currently known variables to predict future cash flows, asset values and withdrawal plans. DLP will use current net worth, tax liabilities, asset allocation, and future retirement and estate plans in developing financial plans.

Typical topics reviewed in a financial plan may include but are not limited to:

- **Financial goals**: Based on an individual's or a family's clearly defined financial goals, including funding a college education for the children, buying a larger home, starting a business, retiring on time or leaving a legacy. Financial goals should be quantified and set to milestones for tracking.
- **Personal net worth statement**: A snapshot of assets and liabilities serves as a benchmark for measuring progress towards financial goals.
- **Cash flow analysis**: An income and spending plan determines how much can be set aside for debt repayment, savings and investing each month.
- **Retirement strategy**: A strategy for achieving retirement independent of other financial priorities. Including a strategy for accumulating the required retirement capital and its planned lifetime distribution.

- **Comprehensive risk management plan**: Identify all risk exposures and provide the necessary coverage to protect the family and its assets against financial loss. The risk management plan includes a full review of life and disability insurance, personal liability coverage, property and casualty coverage, and catastrophic coverage.
- **Long-term investment plan**: Include a customized asset allocation strategy based on specific investment objectives and a risk profile. This investment plan sets guidelines for selecting, buying and selling investments and establishing benchmarks for performance review.
- **Tax reduction strategy**: Identify ways to minimize taxes on personal income to the extent permissible by the tax code. The strategy should include identification of tax-favored investment vehicles that can reduce taxation of investment income.
- **Estate preservation**: Help update accounts, review beneficiaries for retirement accounts and life insurance, provide a second look at your current estate planning documents, and prompt you to update your plan when the legal environment changes or you have major life events such as a marriage, death, or births.

Adhoc Financial Planning

Adhoc financial planning services are on a project basis for an hourly fee. This service is for Clients who require a narrowly focused plan, incidental advice or an abbreviated review session. The specific services requested will be detailed in the financial planning agreement.

If a conflict of interest exists between the interests of DLP and the interests of the Client, the Client is under no obligation to act upon DLP's recommendation. If the Client elects to act on any of the recommendations, the Client is under no obligation to effect the transaction through DLP. Financial plans will be completed and delivered inside of forty five (45) days contingent upon timely delivery of all required documentation.

Client Tailored Services and Client Imposed Restrictions

The goals and objectives for each Client are documented in our Client files. Investment strategies are created that reflect the stated goals and objectives. Clients may impose restrictions on investing in certain securities or types of securities. Agreements may not be assigned without written Client consent.

Wrap Fee Programs

DLP does not sponsor any wrap fee programs.

Assets Under Management

As of December 2022, DLP manages approximately $ 48,500,000.00 were $ 48,500,000.00 is managed on a discretionary basis and $ 0.00 is managed on a non-discretionary basis.

Item 5: Fees and Compensation

Method of Compensation and Fee Schedule

ASSET MANAGEMENT

DLP offers direct asset management services to advisory Clients. DLP charges an annual investment advisory fee based on the total assets under management as follows:

Assets Under Management	Annual Fee	Monthly Fee
First $99,999 or less	1.80%	.1500%
Next $100,000 – $249,999	1.40%	.1167%
Next $250,000 – $499,999	1.20%	.1000%
Next $500,000 - $999,999	1.15%	.0950%
Next $1mm - $2,999,999	1.05%	.0880%
Next $3 mm - $4,999,999	0.80%	.0670%
Subsequent amounts over $5,000,000	Negotiable	Negotiable

This is a blended fee schedule, the asset management fee is calculated by applying different rates to different portions of the portfolio. DLP may group certain related Client accounts for the purposes of achieving the minimum account size and determining the annualized fee.

The annual fee is negotiable based upon certain criteria (e.g., historical relationship, type of assets, anticipated future earning capacity, anticipated future additional assets, dollar amounts of assets to be managed, related accounts, account composition, negotiations with Clients, etc.). Fees are billed monthly in arrears based on the amount of assets managed as of the close of business on the last business day of the previous month. Lower fees for comparable services may be available from other sources. Clients may terminate their account within five (5) business days of signing the Investment Advisory Agreement with no obligation and without penalty. After the initial five (5) business days, the agreement may be terminated by DLP with thirty (30) days written notice to Client and by the Client at any time with written notice to DLP. For accounts opened or closed mid-billing period, fees will be prorated based on the days services are provided during the given period. All unpaid earned fees will be due to DLP. Client shall be given thirty (30) days prior written notice of any increase in fees. Any increase in fees will be acknowledged in writing by both parties before any increase in said fees occurs.

FINANCIAL PLANNING AND CONSULTING

DLP charges an hourly fee for adhoc financial planning services or a fixed fee for comprehensive financial planning services. Prior to the planning process the Client will be provided an estimated plan fee. Services are completed and delivered inside of forty five (45) days contingent upon timely delivery of all required documentation. Client may cancel within five (5) business days of signing Agreement with no obligation and without penalty. If the Client cancels after five (5) business days, any unearned fees will be refunded to the Client, or any unpaid earned fees will be due to DLP. DLP reserves the right to waive the fee should the Client implement the plan through DLP.

HOURLY FEES

Adhoc Financial Planning Services are offered based on an hourly fee of $100 per hour.

FIXED FEES

Comprehensive Financial Planning Services are offered based on a flat fee between $500 and $2,500.

Fees for financial plans are:

Due upon delivery of the completed plan.

Client Payment of Fees

Fees for asset management services are deducted from a designated Client account to facilitate billing or they may pay DLP directly. The Client must consent in advance to direct debiting of their investment account.

Fees for financial plans will be billed to the Client and paid directly to DLP.

Additional Client Fees Charged

Custodians may charge brokerage commissions, transaction fees, and other related costs on the purchases or sales of mutual funds, equities, bonds, options and exchange-traded funds. Mutual funds, money market funds and exchange-traded funds also charge internal management fees, which are disclosed in the fund's prospectus. DLP does not receive any compensation from these fees. All of these fees are in addition to the management fee you pay to DLP. For more details on the brokerage practices, see Item 12 of this brochure.

Prepayment of Client Fees

DLP does not require any prepayment of fees.

If the Client cancels after five (5) business days, any unearned fees will be refunded to the Client, or any unpaid earned fees will be due to DLP.

External Compensation for the Sale of Securities to Clients

DLP does not receive any external compensation for the sale of securities to Clients, nor do any of the investment advisor representatives of DLP.

Item 6: Performance-Based Fees and Side-by-Side Management

Sharing of Capital Gains

Fees are not based on a share of the capital gains or capital appreciation of managed securities.

DLP does not use a performance-based fee structure because of the conflict of interest. Performance based compensation may create an incentive for DLP to recommend an investment that may carry a higher degree of risk to the Client.

Item 7: Types of Clients

Description

DLP generally provides investment advice to individuals and high net worth individuals. Client relationships vary in scope and length of service.

Account Minimums

DLP does not require a minimum to open an account.

Item 8: Methods of Analysis, Investment Strategies and Risk of Loss

Methods of Analysis

Security analysis methods may include fundamental analysis and technical analysis. Investing in securities involves risk of loss that Clients should be prepared to bear. Past performance is not a guarantee of future returns.

Fundamental analysis concentrates on factors that determine a company's value and expected future earnings. This strategy would normally encourage equity purchases in stocks that are undervalued or priced below their perceived value. The risk assumed is that the market will fail to reach expectations of perceived value.

Technical analysis attempts to predict a future stock price or direction based on market trends. The assumption is that the market follows discernible patterns and if these patterns can be identified then a prediction can be made. The risk is that markets do not always follow patterns and relying solely on this method may not take into account new patterns that emerge over time.

In developing a financial plan for a Client, DLP's analysis may include cash flow analysis, investment planning, risk management, tax planning and estate planning. Based on the information gathered, a detailed strategy is tailored to the Client's specific situation.

The main sources of information include financial newspapers and magazines, annual reports, prospectuses, and filings with the Securities and Exchange Commission.

Investment Strategy

The investment strategy for a specific Client is based upon the objectives stated by the Client during consultations. The Client may change these objectives at any time by providing written notice to DLP. Each Client executes a Client profile form or similar form that documents their objectives and their desired investment strategy.

Other strategies may include long-term purchases, trading, and option writing (including covered options, uncovered options or spreading strategies).

Security Specific Material Risks

All investment programs have certain risks that are borne by the investor. Our investment approach constantly keeps the risk of loss in mind. Investors face the following investment risks and should discuss these risks with DLP:

- *Market Risk*: The prices of securities in which clients invest may decline in response to certain events taking place around the world, including those directly involving the companies whose securities are owned by a fund; conditions affecting the general economy; overall market changes; local, regional or global political, social or economic instability; and currency, interest rate and commodity price fluctuations. Investors should have a long-term perspective and be able to tolerate potentially sharp declines in market value.
- *Interest-rate Risk*: Fluctuations in interest rates may cause investment prices to fluctuate. For example, when interest rates rise, yields on existing bonds become less attractive, causing their market values to decline.
- *Inflation Risk*: When any type of inflation is present, a dollar today will buy more than a dollar next year, because purchasing power is eroding at the rate of inflation.

- *Currency Risk*: Overseas investments are subject to fluctuations in the value of the dollar against the currency of the investment's originating country. This is also referred to as exchange rate risk.
- *Reinvestment Risk*: This is the risk that future proceeds from investments may have to be reinvested at a potentially lower rate of return (i.e. interest rate). This primarily relates to fixed income securities.
- *Liquidity Risk*: Liquidity is the ability to readily convert an investment into cash. Generally, assets are more liquid if many traders are interested in a standardized product. For example, Treasury Bills are highly liquid, while real estate properties are not.
- *Management Risk:* The advisor's investment approach may fail to produce the intended results. If the advisor's assumptions regarding the performance of a specific asset class or fund are not realized in the expected time frame, the overall performance of the client's portfolio may suffer.
- *Equity Risk:* Equity securities tend to be more volatile than other investment choices. The value of an individual mutual fund or ETF can be more volatile than the market as a whole. This volatility affects the value of the client's overall portfolio. Small- and mid-cap companies are subject to additional risks. Smaller companies may experience greater volatility, higher failure rates, more limited markets, product lines, financial resources, and less management experience than larger companies. Smaller companies may also have a lower trading volume, which may disproportionately affect their market price, tending to make them fall more in response to selling pressure than is the case with larger companies.
- *Fixed Income Risk:* The issuer of a fixed income security may not be able to make interest and principal payments when due. Generally, the lower the credit rating of a security, the greater the risk that the issuer will default on its obligation. If a rating agency gives a debt security a lower rating, the value of the debt security will decline because investors will demand a higher rate of return. As nominal interest rates rise, the value of fixed income securities held by a fund is likely to decrease. A nominal interest rate is the sum of a real interest rate and an expected inflation rate.
- *Investment Companies Risk:* When a client invests in open end mutual funds or ETFs, the client indirectly bears their proportionate share of any fees and expenses payable directly by those funds. Therefore, the client will incur higher expenses, which may be duplicative. In addition, the client's overall portfolio may be affected by losses of an underlying fund and the level of risk arising from the investment practices of an underlying fund (such as the use of derivatives). ETFs are also subject to the following risks: (i) an ETF's shares may trade at a market price that is above or below their net asset value or (ii) trading of an ETF's shares may be halted if the listing exchange's officials deem such action appropriate, the shares are de-listed from the exchange, or the activation of market-wide "circuit breakers" (which are tied to large decreases in stock prices) halts stock trading generally. Adviser has no control over the risks taken by the underlying funds in which client invests.
- *Foreign Securities Risk:* Funds in which clients invest may invest in foreign securities. Foreign securities are subject to additional risks not typically associated with investments in domestic securities. These risks may include, among others, currency risk,

country risks (political, diplomatic, regional conflicts, terrorism, war, social and economic instability, currency devaluations and policies that have the effect of limiting or restricting foreign investment or the movement of assets), different trading practices, less government supervision, less publicly available information, limited trading markets and greater volatility. To the extent that underlying funds invest in issuers located in emerging markets, the risk may be heightened by political changes, changes in taxation, or currency controls that could adversely affect the values of these investments. Emerging markets have been more volatile than the markets of developed countries with more mature economies.

- *Long-term purchases*: Long-term investments are those vehicles purchased with the intension of being held for more than one year. Typically the expectation of the investment is to increase in value so that it can eventually be sold for a profit. In addition, there may be an expectation for the investment to provide income. One of the biggest risks associated with long-term investments is volatility, the fluctuations in the financial markets that can cause investments to lose value.
- *Trading risk*: Investing involves risk, including possible loss of principal. There is no assurance that the investment objective of any fund or investment will be achieved.
- *Options Trading*: The risks involved with trading options are that they are very time sensitive investments. An options contract is generally a few months. The buyer of an option could lose his or her entire investment even with a correct prediction about the direction and magnitude of a particular price change if the price change does not occur in the relevant time period (i.e., before the option expires). Additionally, options are less tangible than some other investments. An option is a "book-entry" only investment without a paper certificate of ownership.
- *Foreign Investment Risk*: Investments in foreign securities may be riskier than U.S. investments because of factors such as, unstable international, political and economic conditions, currency fluctuations, foreign controls on investment and currency exchange, foreign governmental control of some issuers, potential confiscatory taxation or nationalization of companies by foreign governments, withholding taxes, a lack of adequate company information, less liquid and more volatile exchanges and/or markets, ineffective or detrimental government regulation, varying accounting standards, political or economic factors that may severely limit business activities, and legal systems or market practices that may permit inequitable treatment of minority and/or non-domestic investors. Investments in emerging markets may involve these and other significant risks such as less mature economic structures and less developed and more thinly-traded securities markets.

Item 9: Disciplinary Information

Criminal or Civil Actions

DLP and its management have not been involved in any criminal or civil action.

Administrative Enforcement Proceedings

DLP and its management have not been involved in administrative enforcement proceeding that imposed a civil money penalty of more than $2,500.

Self- Regulatory Organization Enforcement Proceedings

DLP and its management have not been involved in legal or disciplinary events that are material to a Client's or prospective Client's evaluation of DLP or the integrity of its management.

Item 10: Other Financial Industry Activities and Affiliations

Broker-Dealer or Representative Registration

DLP is not registered as a broker- dealer and no affiliated representatives of DLP are registered representatives of a broker-dealer.

Futures or Commodity Registration

Neither DLP nor its affiliated representatives are registered or have an application pending to register as a futures commission merchant, commodity pool operator, or a commodity trading advisor.

Material Relationships Maintained by this Advisory Business and Conflicts of Interest

Jason White is an attorney with Dickmann Reason Bogigian & White. Approximately 50% of this time is spent on this activity. He will offer clients services from this activity. As an attorney, he may receive separate yet typical compensation.

This practice represents a conflict of interest because it gives an incentive to recommend services based on the fee amount received. This conflict is mitigated by disclosures, procedures and the firm's fiduciary obligation to place the best interest of the Client first and the Clients are not required to purchase any services. Clients have the option to purchase these services through another attorney of their choosing.

Recommendations or Selections of Other Investment Advisors and Conflicts of Interest

DLP does not select or recommend other investment advisors.

Item 11: Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

Code of Ethics Description

The affiliated persons (affiliated persons include employees and/or independent contractors) of DLP have committed to a Code of Ethics ("Code"). The purpose of our Code is to set forth standards of conduct expected of DLP affiliated persons and addresses conflicts that may arise. The Code defines acceptable behavior for affiliated persons of DLP. The Code reflects DLP and its supervised persons' responsibility to act in the best interest of their Client.

One area which the Code addresses is when affiliated persons buy or sell securities for their personal accounts and how to mitigate any conflict of interest with our Clients. We do not allow any affiliated persons to use non-public material information for their personal profit or to use internal research for their personal benefit in conflict with the benefit to our Clients.

DLP's policy prohibits any person from acting upon or otherwise misusing non-public or inside information. No advisory representative or other affiliated person, officer or director of DLP may recommend any transaction in a security or its derivative to advisory Clients or engage in personal securities transactions for a security or its derivatives if the advisory representative possesses material, non-public information regarding the security.

DLP's Code is based on the guiding principle that the interests of the Client are our top priority. DLP's officers, directors, advisors, and other affiliated persons have a fiduciary duty to our Clients and must diligently perform that duty to maintain the complete trust and confidence of our Clients. When a conflict arises, it is our obligation to put the Client's interests over the interests of either affiliated persons or the company.

The Code applies to "access" persons. "Access" persons are affiliated persons who have access to non-public information regarding any Clients' purchase or sale of securities, or non-public information regarding the portfolio holdings of any reportable fund, who are involved in making securities recommendations to Clients, or who have access to such recommendations that are non-public.

DLP will provide a copy of the Code of Ethics to any Client or prospective Client upon request

Investment Recommendations Involving a Material Financial Interest and Conflict of Interest

DLP and its affiliated persons do not recommend to Clients securities in which we have a material financial interest.

Advisory Firm Purchase of Same Securities Recommended to Clients and Conflicts of Interest

DLP and its affiliated persons may buy or sell securities that are also held by Clients. In order to mitigate conflicts of interest such as trading ahead of Client transactions, affiliated persons are required to disclose all reportable securities transactions as well as provide DLP with copies of their brokerage statements.

The Chief Compliance Officer of DLP is Jason C. White. He reviews all trades of the affiliated persons each quarter. The personal trading reviews ensure that the personal trading of affiliated persons does not affect the markets and that Clients of the firm receive preferential treatment over associated persons' transactions.

Client Securities Recommendations or Trades and Concurrent Advisory Firm Securities Transactions and Conflicts of Interest

DLP does not maintain a firm proprietary trading account and does not have a material financial interest in any securities being recommended and therefore no conflicts of interest exist. However, affiliated persons may buy or sell securities at the same time they buy or sell securities for Clients. In order to mitigate conflicts of interest such as front running, affiliated persons are required to disclose all reportable securities transactions as well as provide DLP with copies of their brokerage statements.

The Chief Compliance Officer of DLP is Jason C. White. He reviews all trades of the affiliated persons each quarter. The personal trading reviews ensure that the personal trading of affiliated persons does not affect the markets and that Clients of the firm receive preferential treatment over associated persons' transactions.

Item 12: Brokerage Practices

Factors Used to Select Broker-Dealers for Client Transactions

DLP will recommend the use of a particular broker-dealer or may utilize a broker-dealer of the Client's choosing. DLP will select appropriate brokers based on a number of factors including but not limited to their relatively low transaction fees and reporting ability. DLP relies on its broker to provide its execution services at the best prices available. Lower fees for comparable services may be available from other sources. Clients pay for any and all custodial fees in addition to the advisory fee charged by DLP.

- *Directed Brokerage*
  In circumstances where a Client directs DLP to use a certain broker-dealer, DLP still has a fiduciary duty to its Clients. The following may apply with Directed Brokerage: DLP's inability to negotiate commissions, to obtain volume discounts, there may be a disparity in commission charges among Clients and conflicts of interest arising from brokerage firm referrals. The firm may be unable to achieve most favorable execution of client transactions, and this practice may cost clients more money.

- *Brokerage for Client Referrals*
  DLP does not receive client referrals from any custodian or third party in exchange for using that broker-dealer or third party.

- *Best Execution*

  Investment advisors who manage or supervise Client portfolios have a fiduciary obligation of best execution. The determination of what may constitute best execution and price in the execution of a securities transaction by a broker involves a number of considerations and is subjective. Factors affecting brokerage selection include the overall direct net economic result to the portfolios, the efficiency with which the transaction is effected, the ability to affect the transaction where a large block is involved, the operational facilities of the broker-dealer, the value of an ongoing relationship with such broker and the financial strength and stability of the broker. DLP does not receive any portion of the trading fees.

- *Soft Dollar Arrangements*
  The Securities and Exchange Commission defines soft dollar practices as arrangement under which products or services other than execution services are obtained by DLP from or through a broker-dealer in exchange for directing Client transactions to the broker-dealer. As permitted by Section 28(e) of the Securities Exchange Act of 1934, DLP receives economic benefits as a result of commissions generated from securities transactions by the broker-dealer from the accounts of DLP. These benefits include both proprietary research from the broker and other research written by third parties.
  A conflict of interest exists when DLP receives soft dollars. This conflict is mitigated by the fact that DLP has a fiduciary responsibility to act in the best interest of its Clients and the services received are beneficial to all Clients.
  DLP utilizes the services of custodial broker dealers. Economic benefits are received by DLP which would not be received if DLP did not give investment advice to Clients. These benefits include: A dedicated trading desk, a dedicated service group

and an account services manager dedicated to DLP's accounts, ability to conduct "block" Client trades, electronic download of trades, balances and positions, duplicate and batched Client statements, and the ability to have advisory fees directly deducted from Client accounts.

Aggregating Securities Transactions for Client Accounts

DLP is authorized in its discretion to aggregate purchases and sales and other transactions made for the account with purchases and sales and transactions in the same securities for other Clients of DLP. All Clients participating in the aggregated order shall receive an average share price with all other transaction costs shared on a pro-rated basis. If aggregation if not allowed or infeasible and individual transactions occur (e.g., withdrawal or liquidation requests, odd-late trades, etc.) an account may potentially be assessed higher costs or less favorable prices than those where aggregation has occurred.

Item 13: Review of Accounts

Schedule for Periodic Review of Client Accounts or Financial Plans and Advisory Persons Involved

Account reviews are performed quarterly by the Chief Compliance Officer of DLP. Account reviews are performed more frequently when market conditions dictate. Reviews of Client accounts include, but are not limited to, a review of Client documented risk tolerance, adherence to account objectives, investment time horizon, and suitability criteria, reviewing target allocations of each asset class to identify if there is an opportunity for rebalancing, and reviewing accounts for tax loss harvesting opportunities.

Financial plans generated are updated as requested by the Client and pursuant to a new or amended agreement, DLP suggests updating at least annually.

Review of Client Accounts on Non-Periodic Basis

Other conditions that may trigger a review of Clients' accounts are changes in the tax laws, new investment information, and changes in a Client's own situation.

Content of Client Provided Reports and Frequency

Clients receive written account statements no less than monthly for managed accounts. Account statements are issued by DLP's custodian. Client receives confirmations of each transaction in account from Custodian and an additional statement during any month in which a transaction occurs. DLP does not provide additional reports to Clients.

Item 14: Client Referrals and Other Compensation

Economic Benefits Provided to the Advisory Firm from External Sources and Conflicts of Interest

DLP may receive economic benefits from external sources as outlined in Item 12 above.

Advisory Firm Payments for Client Referrals

DLP does not compensate for Client referrals.

Item 15: Custody

Account Statements

All assets are held at qualified custodians, which means the custodians provide account statements directly to Clients at their address of record at least quarterly. Clients are urged to compare the account statements received directly from their custodians to any documentation or reports prepared by DLP.

DLP is deemed to have limited custody solely because advisory fees are directly deducted from Client's accounts by the custodian on behalf of DLP.

If DLP is authorized or permitted to deduct fees directly from the account by the custodian:

- DLP will provide the Client with an invoice concurrent to instructing the custodian to deduct the fee stating the amount of the fee, the formula used to calculate the fee, the amount of assets under management the fee is based on and the time period covered by the fee;
- DLP will obtain written authorization signed by the Client allowing the fees to be deducted; and
- The Client will receive quarterly statements directly from the custodian which disclose the fees deducted.

DLP is also deemed to have limited custody due to its Third-Party Standing Letters of Authorization ("SLOA").

DLP and its qualified custodian meet the following nine (9) conditions in order to avoid maintaining full custody based on 710 Ind. Admin. Code 4-9-13(a)(6):

1. The Client provides an instruction to the qualified custodian, in writing, that includes the Client's signature, the third party's name, and either the third party's address or the third party's account number at a custodian to which the transfer should be directed.
2. The Client authorizes DLP, in writing, either on the qualified custodian's form or separately, to direct transfers to the third party either on a specified schedule or from time to time.
3. The Client's qualified custodian performs appropriate verification of the instruction, such as a signature review or other method to verify the Client's authorization.
4. DLP provides a written transfer of funds notice to the Client promptly after each third-party transfer pursuant to the SLOA arrangement; the notice should indicate the amount, date, receiving party, and reason(s) for the transfer.
5. The Client has the ability to terminate or change the instruction to the Client's qualified custodian.
6. DLP has no authority or ability to designate or change the identity of the third party, the address, or any other information about the third party contained in the Client's instruction.
7. DLP maintains records showing that the third party is not a related party of DLP or located at the same address as DLP.
8. The Client's qualified custodian sends the Client, in writing, an initial notice confirming

the instruction and an annual notice reconfirming the instruction.

9. In addition to including the Client funds and securities that are subject to a SLOA that result in custody in its response to Item 9 of Form ADV and explaining the arrangement(s) in Item 15 of Form ADV Part 2, DLP must include in Schedule D – Miscellaneous of Form ADV Part 1 and Item 15 of Form ADV Part 2: (a) both the amount and number of Clients included in the Item (custody figures solely because of the SLOA(s); and (b) an attestation that DLP is complying with each of the requirements and conditions enumerated in this Statement of Policy.

Item 16: Investment Discretion

Discretionary Authority for Trading

If applicable, Client will authorize DLP discretionary authority, via the advisory agreement, to determine, without obtaining specific Client consent, the securities to be bought or sold, and the amount of the securities to be bought or sold. If applicable, Client will authorize DLP discretionary authority to execute selected investment program transactions as stated within the Investment Advisory Agreement. If however, consent for discretion is not given, DLP will obtain prior Client approval before executing each transaction.

DLP allows Clients to place certain restrictions, as outlined in the Client's Investment Policy Statement or similar document. Such restrictions could include only allowing purchases of socially conscious investments. These restrictions must be provided to DLP in writing.

The Client approves the custodian to be used and the commission rates paid to the custodian. DLP does not receive any portion of the transaction fees or commissions paid by the Client to the custodian.

Item 17: Voting Client Securities

Proxy Votes

DLP does not vote proxies on securities. Clients are expected to vote their own proxies. The Client will receive their proxies directly from the custodian of their account or from a transfer agent.

When assistance on voting proxies is requested, DLP will provide recommendations to the Client. If a conflict of interest exists, it will be disclosed to the Client. If the Client requires assistance or has questions, they can reach out to the investment advisor representatives of the firm at the contact information on the cover page of this document.

Item 18: Financial Information

Balance Sheet

A balance sheet is not required to be provided to Clients because DLP does not serve as a custodian for Client funds or securities and DLP does not require prepayment of fees of more than $500 per Client and six months or more in advance.

Financial Conditions Reasonably Likely to Impair Advisory Firm's Ability to Meet Commitments to Clients

DLP has no condition that is reasonably likely to impair our ability to meet contractual commitments to our Clients.

Bankruptcy Petitions during the Past Ten Years

DLP has not had any bankruptcy petitions in the last ten years.

Item 19: Requirements for State Registered Advisors

Principal Executive Officers and Management Persons

The education and business background for all management and supervised persons can be found in the Part 2B of this Brochure.

Outside Business Activities

The outside business activities for all management and supervised persons can be found in the Part 2B of this Brochure.

Performance Based Fee Description

Neither DLP nor its management receive performance based fees. Please see Item 6 of the ADV 2A for more information.

Disclosure of Material Facts Related to Arbitration or Disciplinary Actions Involving Management Persons

Neither DLP nor its management have been involved in any of the following:

1. An award or otherwise been found liable in an arbitration claim alleging damages in excess of $2,500, involving any of the following:
    1. An investment or an investment-related business or activity;
    2. Fraud, false statement(s) or omissions;
    3. Theft, embezzlement or other wrongful taking of property;
    4. Bribery, forgery, counterfeiting, or extortion;
    5. Dishonest, unfair or unethical practices.
2. An award or otherwise been found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
    1. An investment or an investment-related business or activity;
    2. Fraud, false statement(s) or omissions;
    3. Theft, embezzlement or other wrongful taking of property;
    4. Bribery, forgery, counterfeiting, or extortion;
    5. Dishonest, unfair or unethical practices.

Material Relationship Maintained by this Advisory Business or Management persons with Issuers of Securities

There are no material relationships with issuers of securities to disclose.

Item 1 Cover Page

SUPERVISED PERSON BROCHURE

FORM ADV PART 2B

Jason C. White, CPWA

Dynamic Legacy Planning LLC

Office Address:
17 N Pennsylvania Street
Greenfield, IN 46140

Tel: 317-477-7283
Fax: 317-462-1970

jason.white@dynamiclegacyplans.com

Website:
www.dynamiclegacyplans.com

This brochure supplement provides information about Jason White and supplements the Dynamic Legacy Planning LLC brochure. You should have received a copy of that brochure. Please contact Jason White if you did not receive the brochure or if you have any questions about the contents of this supplement.

Additional information about Jason White (CRD #2766121) is available on the SEC's website at .

Brochure Supplement (Part 2B of Form ADV)

Supervised Person Brochure

Principal Executive Officer – Jason C. White, CPWA

- Year of Birth: 1974

Item 2 Educational Background and Business Experience

Educational Background:

- Indiana University School of Law; Juris Doctorate; 1999
- Indiana University; Bachelor of Science - Kinesiology; 1996

Business Experience:

- Dickmann Reason Bogigian & White; Owner/Attorney; 02/2015 – Present
- CWM, LLC (IA Firm #155344); Registered Investment Advisor; 7/8/2021 – Present
- Genuine Wealth Management LLC dba Genuine Wealth; Managing Member /Investment Advisor Representative; 02/2015 - 6/30/2021
- Greenfield Banking Company; Vice-President, Wealth Advisor and Trust Officer; 03/2009 – 02/2015

Professional Certifications

Employees have earned certifications and credentials that are required to be explained in further detail.

<u>Certified Private Wealth Advisor (CPWA)</u>: issued by the Investment Management Consultants Association. Candidates must have:

- A satisfactory record of ethical conduct, as determined by IMCA's Admissions Committee.
- Five years of professional Client-centered experience in financial services or a related industry.
- Bachelor's degree from an accredited college or university or one of the following designations or licenses: CIMA, CIMC, CFA, CFP, ChFC or CPA license.
- Complete a six-month pre-study education component and five-day university- sponsored classroom training.
- Pass a final exam
- Complete 40 hours of Continuing Education every two years.

Item 3 - Disciplinary Information

A. Mr. White has never been involved in a criminal or civil action in a domestic, foreign or military court of competent jurisdiction for which he:

1. Was convicted of, or pled guilty or nolo contender ("no contest") to (a) any felony; (b) misdemeanor that involved investments or an investment-related business, fraud, false statement or omissions, wrongful taking of property, bribery, perjury, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
2. Is the named subject of a pending criminal proceeding that involves an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;

3. Was found to have been involved in a violation of an investment-related statute or regulation; or
4. Was the subject of any order, judgement or decree permanently or temporarily enjoining, or otherwise limiting, him from engaging in any investment related activity, or from violating any investment-related statute, rule, or order.

B. Mr. White never had an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority in which he:
   1. Was found to have caused an investment-related business to lose its authorization to do business; or the subject of an order by the agency or authority;
   2. Was found to have been involved in a violation of an investment-related statute or regulation or was the subject of an order by the agency or authority (a)denying, suspending or revoking the authorization of the supervised person to act in an investment-related business; (b) barring or suspending his association with an investment-related business; (c) otherwise significantly limiting his investment-related activities; or (d) imposing a civil money penalty of more than $2,500 on him.

C. Mr. White has never been the subject of a self-regulatory organization (SRO) proceeding in which he:
   1. Was found to have caused an investment-related business to lose its authorization to do business; or
   2. Was found to have been involved in a violation of the SRO's rules and was: (a) barred or suspended from membership or from association with other members, or was expelled from membership; (b) otherwise significantly limited from investment-related activities; or (c) fined more than $2,500.

D. Mr. White has not been involved in any other hearing or formal adjudication in which a professional attainment, designation, or license of the supervised person was revoked or suspended because of a violation of rules relating to professional conduct.

Item 4 - Other Business Activities

Jason White is an attorney with Dickmann Reason Bogigian & White. Approximately 50% of this time is spent on this activity. He will offer clients services from this activity. As an attorney, he may receive separate yet typical compensation.

This practice represents a conflict of interest because it gives an incentive to recommend services based on the fee amount received. This conflict is mitigated by disclosures, procedures and the firm's fiduciary obligation to place the best interest of the Client first and the Clients are not required to purchase any services. Clients have the option to purchase these services through another attorney of their choosing.

Item 5 - Additional Compensation

Jason White does not receive any additional compensation. In addition, he does not receive any performance-based fees.

Item 6 - Supervision

Jason C. White is the Chief Compliance Officer of DLP. Jason White's reviews work through Client account reviews and quarterly personal transaction reports, as well as face-to-face and phone interactions. Jason C. White can be reached at jason.white@dynamiclegacyplans.com or 317-477-7283.

Item 7 - Requirements for State-Registered Advisors

A. Mr. White has not been involved in any of the following:

1. An award or otherwise been found liable in an arbitration claim alleging damages in excess of $2,500 involving any of the following:
   a) An investment or an investment-related business or activity;
   b) Fraud, false statement(s) or omissions;
   c) Theft, embezzlement or other wrongful taking of property;
   d) Bribery, forgery, counterfeiting, or extortion;
   e) Dishonest, unfair or unethical practices.

2. An award or otherwise been found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
   a) An investment or an investment-related business or activity;
   b) Fraud, false statement(s) or omissions;
   c) Theft, embezzlement or other wrongful taking of property;
   d) Bribery, forgery, counterfeiting, or extortion;
   e) Dishonest, unfair or unethical practices.

B. Mr. White has never been the subject of a bankruptcy petition.