

Greer Gibson Bacon, CFP®

ASSET PLANNING & MANAGEMENT, INC.

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Brochure Supplement
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This brochure supplement is provided as an attachment to our disclosure brochure. Please contact us if it is not attached or you have questions.

You may find out more about Greer Gibson Bacon, CFP® by visiting the SEC website at www.adviserinfo.sec.gov where you may search for her by name or CRD number 704356. Also, you may find out more by visiting the Certified Financial Planner™ Board of Standards website at www.cfp.net.

Educational Background & Business Experience

NAME: Greer Gibson Bacon, CFP®

DATE OF BIRTH: September 23, 1955

EMPLOYMENT HISTORY

1997-Present **President, Asset Planning & Management, Inc., Spokane, WA.**

Firm provides comprehensive wealth management services for individuals and families, and their trusts, professional practices and closely-held businesses. Co-manager of client portfolios with primary responsibility for financial planning. Uniform Investment Advisor Law (Series 65) examination and licensing is waived for Certified Financial Planner™ designees.

1986-1996 **Vice President/Manager, Investment Services & Trust Business Development Departments, Washington Trust Bank, Spokane, WA.**

Managed Private Banking client portfolios. Appointed by WTB Board of Directors as bank officer responsible for supervision of securities activities and provision of investment advice to bank customers (approximately \$300 million in client assets), and compliance with applicable regulations. Supervised trust sales to bank customers (approximately \$100 million in client assets). Bank customers included individuals and their families, trusts, professional practices and businesses. Held various licenses including Government Securities Principal license, Municipal Securities Principal (Series 53) license, and life and disability insurance agent license.

1979-1985 **Account Executive, Smith Barney, Harris Upham & Company, Seattle, WA.**

Sold securities, including stocks, bonds, mutual funds, options, limited partnerships and private placements to affluent individuals and families. Held various licenses including General Securities (Series 7), Commodity Futures (Series 3) Representative licenses, and Uniform Agent State Law (Series 63) license.

PROFESSIONAL ASSOCIATIONS

Member, Financial Planning Association (FPA), National and Spokane Chapter. Current Director, former Program and Membership Chairs of Spokane Chapter. Founding Chair of Annual Workshop.

Member, Spokane Estate Planning Council. Former President, Vice President, Secretary-Treasurer and Membership Chair. Chair of 2012 Annual Continuing Education Workshop. Current Program Committee member.

Former Member, State of Washington Securities Advisory Committee, Appointment of Governor Christine Gregoire. Advised Department of Financial Institutions and Securities Administrator regarding securities-related issues.

Former Member, State of Washington Financial Literacy Public Private Partnership (FLPPP), Appointment of Governor Christine Gregoire. Consulted regarding financial literacy curriculums and certifications for Washington public schools. Member of the predecessor committee, Financial Literacy Work Group.

Former Arbitrator, National Association of Securities Dealers (NASD) Regulation, Incorporated, Board of Arbitrators (Arbitrator Number A30973). This securities regulator is now named the Financial Industry Regulatory Authority (FINRA).

EDUCATION

1994 **Granted CERTIFIED FINANCIAL PLANNER™ (CFP®) professional designation.** Completed professional education program and examination, experience and ethics requirements of the CFP® Board of Standards.

What is a CFP® designee?

Accredited by the National Commission for Certifying Agencies (NCCA), the CFP® designation is granted to individuals who fulfill rigorous education, examination, experience and ethics requirements. Candidates must hold a bachelor's degree from an accredited college and complete a CFP®-board registered educational program or hold one of these designations: Certified Public Accountant (CPA), Chartered Financial Consultant (ChFC), Chartered Life Underwriter (CLU), Chartered Financial Analyst (CFA), doctorate in business administration, economics or law. They must pass a 2-day, 10-hour written examination encompassing all areas of personal financial planning. In November 2016, only 63% of those who sat for the examination passed. Finally, candidates must have three years of full-time financial planning experience and agree to abide by the CFP® Code of Ethics. CFP® designees must complete at least 30 hours of continuing education every two years.

For more information, you may visit the CFP® Board of Standards at www.cfp.net. To compare the requirements for this designation with those of other designations, you may visit the FINRA Professional Designations database at www.finra.org/investors/professional-designations.

- 1987 Cannon Financial Institute, Trust Business Development School/Employee Benefits, Athens, GA.
- 1986 Cannon Financial Institute, Trust Business Development School/Personal Trust, Athens, GA.
- 1977 Master of Arts Degree (MA, Speech), Washington State University, Pullman, WA.
- 1976 Bachelor of Arts Degree (BA, Speech), Washington State University, Pullman, WA.
- 1973 Diploma, Lewis & Clark High School, Spokane, WA

Disciplinary Information

Our employee does not have any disciplinary information to report.

Other Business Activities

Our employee does not have any other business activities to report.

Additional Compensation

Our employee does not receive economic benefit from any third party for providing advisory services.

Supervision

Greer Gibson Bacon, CFP®, is sole shareholder of Asset Planning & Management, Inc. As such, she is responsible for supervising all employees and does not have a supervisor within the firm.