



# RELIANT

WEALTH PLANNING

RELIANT WEALTH PLANNING  
301 Townepark Circle  
Louisville, KY 40243

502-398-5050

[www.reliantwealthplanning.com](http://www.reliantwealthplanning.com)

Form ADV Part 2B: Brochure Supplement for

## Shaun Chelf

May, 2019

**This brochure supplement provides information about Shaun Chelf that supplements the Reliant Wealth Planning Firm Disclosure Brochure. You should have received a copy of that brochure. Please contact us if you did not receive the Reliant Wealth Planning Firm Disclosure Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Shaun Chelf and Reliant Wealth Planning is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

**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.**

## Item 2 Educational Background and Business Experience

Shaun Chelf is the co-founder and a private wealth adviser at Reliant Wealth Planning, LLC. Born in 1973, Mr. Chelf has over 19 years of professional experience dedicated to advising clients on investments, estate planning, retirement planning and other financial matters.

Mr. Chelf earned his Bachelor's degree from the United States Military Academy at West Point and a Masters of Theological Studies from Liberty Baptist Theological Seminary. Prior to joining Reliant Wealth Planning, he was a Senior Vice President and Financial Consultant for Hilliard Lyons.

## Item 3 Disciplinary Information

Securities laws require an advisor to disclose any material instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices.

There are no material legal, civil or disciplinary events to disclose regarding Mr. Chelf. However, we do encourage you to independently view the background of Mr. Chelf on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his name or by his Individual CRD # 4168723.

## Item 4 Other Business Activities

### Broker Dealer Affiliation

Mr. Chelf is also a registered representative of APW Capital, Inc. ("APW") which provides securities brokerage services used to implement securities transactions under a separate commission based arrangement. Mr. Chelf may be entitled to a portion of the brokerage commissions paid to APW, as well as a share of any ongoing distribution or service (trail) fees from the sale of variable, fixed and indexed annuities and mutual funds. Prior to effecting any transactions, clients are required to enter into a separate account agreement with APW.

### Insurance Agency Affiliation

Mr. Chelf is also a licensed insurance professional. Implementations of insurance recommendations are also conducted through APW. As an insurance professional, Mr. Chelf may receive customary commissions and other related revenues from the various insurance companies whose products are sold.

### Potential Conflicts of Interest

Mr. Chelf is not obligated to offer securities on a commission basis through APW or the products of any particular insurance company. However, commissions generated by securities transactions or insurance sales do not offset regular advisory fees. This may cause a conflict of interest in recommending certain securities transactions or products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Chelf or the Advisor.

## Item 5 Additional Compensation

Mr. Chelf has additional business activities that are detailed in Item 4 above. In addition, as detailed in Item 12 of the Reliant Wealth Planning Firm Disclosure Brochure, Mr. Chelf and Reliant generally

recommend that clients utilize the custody, brokerage and clearing services of Raymond James Financial Services (“RJFS”). As a result, Mr. Chelf receives products and services that benefit him and Reliant Wealth Planning, but may not directly benefit the client or its account.

## Item 6 Supervision

Mr. Chelf serves as a managing member of Reliant Wealth Planning. The firm’s Chief Compliance Officer is Tricia Fleege Ettin. They both can be reached at 502-398-5050.

In addition, Reliant Wealth Planning has implemented a Code of Ethics and internal compliance that guide each Supervised Person in meeting their fiduciary obligations to Clients. Further, Reliant Wealth Planning is subject to regulatory oversight by regulatory agencies that may require registration of the firm and its Supervised Persons. As a registered entity, Reliant Wealth Planning is subject to examinations by the regulators, which may be announced or unannounced. Reliant Wealth Planning is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



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Form ADV Part 2B: Brochure Supplement for

**Laura Clark**

May, 2019

**This brochure supplement provides information about Laura Clark that supplements the Reliant Wealth Planning Firm Disclosure Brochure. You should have received a copy of that brochure. Please contact us if you did not receive the Reliant Wealth Planning Firm Disclosure Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Laura Clark and Reliant Wealth Planning is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

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## Item 2 Educational Background and Business Experience

Laura Clark is the co-founder and a private wealth adviser at Reliant Wealth Planning, LLC. Born in 1971, Ms. Clark has over 18 years of professional experience dedicated to advising clients on investments, estate planning, retirement planning and other financial matters.

Ms. Clark earned her Bachelor's degree from California State University, East Bay and a Masters in Business Administration from the University of Louisville. Prior to joining Reliant Wealth Planning, she was a Senior Vice President and Financial Consultant for Hilliard Lyons.

## Item 3 Disciplinary Information

Securities laws require an advisor to disclose any material instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices.

There are no material legal, civil or disciplinary events to disclose regarding Ms. Clark. However, we do encourage you to independently view the background of Ms. Clark on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his-her name or by his-her Individual CRD # 4270026.

## Item 4 Other Business Activities

### Broker Dealer Affiliation

Ms. Clark is also a registered representative of APW Capital, Inc. ("APW") which provides securities brokerage services used to implement securities transactions under a separate commission based arrangement. Ms. Clark may be entitled to a portion of the brokerage commissions paid to APW, as well as a share of any ongoing distribution or service (trail) fees from the sale of variable, fixed and indexed annuities and mutual funds. Prior to effecting any transactions, clients are required to enter into a separate account agreement with APW.

### Insurance Agency Affiliation

Ms. Clark is also a licensed insurance professional. Implementations of insurance recommendations are also conducted through APW. As an insurance professional, Ms. Clark may receive customary commissions and other related revenues from the various insurance companies whose products are sold.

### Potential Conflicts of Interest

Ms. Clark is not obligated to offer securities on a commission basis through APW or the products of any particular insurance company. However, commissions generated by securities transactions or insurance sales do not offset regular advisory fees. This may cause a conflict of interest in recommending certain securities transactions or products of the insurance companies. Clients are under no obligation to implement any recommendations made by Ms. Clark or the Advisor.

## Item 5 Additional Compensation

Ms. Clark has additional business activities that are detailed in Item 4 above. In addition, as detailed in Item 12 of the Reliant Wealth Planning Firm Disclosure Brochure, Ms. Clark and Reliant generally

recommend that clients utilize the custody, brokerage and clearing services of Raymond James Financial Services (“RJFS”). As a result, Ms. Clark receives products and services that benefit him and Reliant Wealth Planning, but may not directly benefit the client or its account.

## Item 6 Supervision

Ms. Clark serves as a managing member of Reliant Wealth Planning, and she is supervised by Shaun Chelf. The firm’s Chief Compliance Officer is Tricia Fleege Ettin. They both can be reached at 502-398-5050.

In addition, Reliant Wealth Planning has implemented a Code of Ethics and internal compliance that guide each Supervised Person in meeting their fiduciary obligations to Clients. Further, Reliant Wealth Planning is subject to regulatory oversight by regulatory agencies that may require registration of the firm and its Supervised Persons. As a registered entity, Reliant Wealth Planning is subject to examinations by the regulators, which may be announced or unannounced. Reliant Wealth Planning is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.



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Form ADV Part 2B: Brochure Supplement for

**Gabriel E. Beeler**

May, 2019

**This brochure supplement provides information about Gabriel Beeler that supplements the Reliant Wealth Planning Firm Disclosure Brochure. You should have received a copy of that brochure. Please contact us if you did not receive the Reliant Wealth Planning Firm Disclosure Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Gabriel Beeler and Reliant Wealth Planning is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

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## Item 2 Educational Background and Business Experience

Gabriel Beeler is an associate private wealth adviser at Reliant Wealth Planning, LLC. Mr. Beeler was born in 1989 and joined Reliant Wealth Planning in 2018.

Mr. Beeler earned his Bachelor's degree from the University of Tennessee in Business Administration with a concentration in Finance. Prior to joining Reliant Wealth Planning, he was an independent life insurance agent.

## Item 3 Disciplinary Information

Securities laws require an advisor to disclose any material instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices.

There are no material legal, civil or disciplinary events to disclose regarding Mr. Beeler. However, we do encourage you to independently view the background of Mr. Beeler on the Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with his name or by his Individual CRD # 7099305.

## Item 4 Other Business Activities

Mr. Beeler has no additional business activities.

## Item 5 Additional Compensation

Mr. Beeler receives no additional compensation.

## Item 6 Supervision

Mr. Beeler is supervised by Shaun Chelf and Laura Clark. The firm's Chief Compliance Officer is Tricia Fleege Ettin. They can be reached at 502-398-5050.

In addition, Reliant Wealth Planning has implemented a Code of Ethics and internal compliance that guide each Supervised Person in meeting their fiduciary obligations to Clients. Further, Reliant Wealth Planning is subject to regulatory oversight by regulatory agencies that may require registration of the firm and its Supervised Persons. As a registered entity, Reliant Wealth Planning is subject to examinations by the regulators, which may be announced or unannounced. Reliant Wealth Planning is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.