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# SLP Wealth LLC

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Jared Costigan

Address: 555 South Mangum St  
Suite 100  
Durham, NC 27701

Phone: (314) 301-8219

Email: [jared@slpwealth.com](mailto:jared@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Jared Costigan that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Jared Costigan is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 7399691.

## Item 2: Educational Background & Business Experience

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Name: Jared Cohen Costigan

Year of Birth: 1993

Education: BS, Economics  
Bridgewater State University  
2015

BA, Sociology  
Bridgewater State University  
2015

Business Background: Financial Planner  
SLP Wealth LLC  
Nov 2023 - Present

Student Loan Consultant  
Student Loan Planner  
Aug 2023 – Present

Advisor Associate  
Wealthspire Advisors  
Sep 2022 – Aug 2023

Associate Wealth Advisor  
Private Capital Group, LLC  
May 2021 – Sep 2022

Client Services Associate  
Coyle Financial Counsel  
Aug 2018 – Apr 2021

Student Success Counselor  
Bottom Line  
Aug 2017 - July 2018

Professional Designations: Certified Financial Planner ®

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications and standards required of a CFP® may be found by visiting the CFP® Board of Standard's website at <http://www.cfp.net/>.

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Jared Costigan.

## Item 4: Other Business Activities

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- A. Jared Costigan is not actively engaged in any other investment-related business or occupation.
- B. Jared Costigan is a Student Loan Consultant with Student Loan Planner. He spends approximately 70 hours per month on this business.

## Item 5: Additional Compensation

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Jared Costigan does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

## Item 6: Supervision

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Jared Costigan is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to Firm Legal Name's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.

# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Benjamin Lacomis

Address: 555 South Mangum St  
Suite 100  
Durham, NC 27701

Phone: (314) 301-8219

Email: [benjamin@slpwealth.com](mailto:benjamin@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Benjamin Lacomis that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Benjamin Lacomis is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 6820579.

## Item 2: Educational Background & Business Experience

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Name: Benjamin Joseph Lacomis

Year of Birth: 1995

Education: BS, Business Administration  
University of Pittsburgh  
2017

Business Background:

Financial Planner  
SLP Wealth LLC  
Oct 2023 - Present

Student Loan Consultant  
Student Loan Planner  
Aug 2022 – Present

Financial Planning Analyst  
Axias Wealth Advisors  
Feb 2022 – Sep 2023

Financial Planner  
MassMutual Pittsburgh  
May 2015 – Feb 2022

Financial Planner & Co-Founder  
Edge Wealth Strategies  
Aug 2017 - Aug 2021

Professional Designations: Certified Financial Planner ®

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications and standards required of a CFP® may be found by visiting the CFP® Board of Standard's website at <http://www.cfp.net/>.

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Benjamin Lacomis.

## Item 4: Other Business Activities

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- A. Although Benjamin Lacomis is a licensed insurance agent, he does not actively sell insurance products.
- B. Benjamin Lacomis is a Student Loan Consultant with Student Loan Planner. He spends approximately 60-80 hours per month on this business.

## Item 5: Additional Compensation

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Benjamin Lacomis does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

## Item 6: Supervision

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Benjamin Lacomis is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to Firm Legal Name's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Travis Hornsby

Address: 555 South Mangum St  
Suite 100  
Durham, NC 27701

Phone: (314) 301-8219

Email: [travis@slpwealth.com](mailto:travis@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Travis Hornsby that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Travis Hornsby is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 6094394.



## Item 2: Educational Background & Business Experience

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Name: Travis Lee Hornsby

Year of Birth: 1990

Education: BA, Economics  
University of Florida  
2012

BS, Statistics  
University of Florida  
2012

Business Background: President  
SLP Wealth LLC  
Mar 2023 – Present

Owner & CEO  
Student Loan Planner  
Sep 2016 – Present

Owner  
Millennial Moola  
Jul 2015 – Jun 2021

Bond Trader  
Vanguard Group  
Jul 2012 - Jun 2015

Professional Designations: Chartered Financial Analyst ®

The CFA® charter is an investment analysis credential awarded by the CFA Institute. In order to earn and maintain the CFA® designation, individuals must meet the initial certification components of (i) a bachelor's degree or equivalent education/work experience, (ii) pass the Level I CFA Exam, CIPM Program Level II Exam, RBA Netherlands Exam, or the self-administered Standards of Practice Exam, (iii) attain 4,000 hours of relevant experience in the investment decision-making process, (iv) provide at least two professional references, (v) submit a certification application every year, and (vi) pay an annual due. Further information about the qualifications and standards required of a CFA® may be found by visiting the CFA Institute's website at [www.cfainstitute.org](http://www.cfainstitute.org).

Certified Financial Planner ®

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two

years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications and standards required of a CFP® may be found by visiting the CFP® Board of Standard's website at <http://www.cfp.net/>.

### Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Travis Hornsby.

### Item 4: Other Business Activities

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- C. Travis Hornsby is currently the owner of SLP Insurance LLC, an investment-related firm for which he spends approximately 10 working hours per month.
- D. Travis Hornsby is currently the owner and CEO of SL Planner LLC dba Student Loan Planner, an online periodical focused on debt repayment strategies for professionals. He spends approximately 80 hours per month on activities related to this business.
- E. Travis Hornsby is currently the owner of SLP Partners LLC. He spends approximately 10 hours per month providing managerial services for Student Loan Planner entities.

### Item 5: Additional Compensation

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Travis Hornsby does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

### Item 6: Supervision

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Travis Hornsby is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to Firm Legal Name's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.

## Item 1: Cover Page

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Conor Mahlmann

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Suite 100  
Durham, NC 27701

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Email: [conor@slpwealth.com](mailto:conor@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Conor Mahlmann that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Conor Mahlmann is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 6435510.

## Item 2: Educational Background & Business Experience

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Name: Conor Michael Mahlmann

Year of Birth: 1992

Education: BS, Agricultural Economics  
University of Arkansas  
2013

Business Background: Investment Adviser Representative  
SLP Wealth LLC  
Apr 2023 – Present

Student Loan Consultant  
Student Loan Planner  
May 2022 – Present

Chief Executive Officer  
Kippington Capital Management  
Feb 2018 – Apr 2023

Financial Services Representative  
TD Ameritrade  
Jan 2015 – Oct 2017

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Conor Mahlmann.

## Item 4: Other Business Activities

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- A. Conor Mahlmann is not actively engaged in any other investment-related business or occupation.
- B. Conor Mahlmann currently serves as a Student Loan Consultant at Student Loan Planner for which he spends approximately 108 hours per month creating media content and attending events on behalf of the company.

## Item 5: Additional Compensation

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Conor Mahlmann does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

## Item 6: Supervision

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Conor Mahlmann is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Simcha Terwilliger

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Suite 100  
Durham, NC 27701

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Email: [sim@slpwealth.com](mailto:sim@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Simcha Terwilliger that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Simcha Terwilliger is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 6709279.

## Item 2: Educational Background & Business Experience

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Name: Simcha Shachar Terwilliger

Year of Birth: 1991

Education: BA, Modern Middle Eastern Studies  
University of Pennsylvania  
2013

Business Background: CCO  
SLP Wealth LLC  
Sep 2023 – Present

Investment Advisor Representative  
SLP Wealth LLC  
Apr 2023 – Present

Student Loan Consultant  
Student Loan Planner  
Feb 2022 – Present

Paraplanner and Associate Advisor  
Fox and Company Wealth Management  
Oct 2018 – Jan 2022

Paraplanner  
The Advisory Firm of Katherine Brown  
Jun 2016 – Oct 2018

Professional Designations: Certified Financial Planner ®

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications and standards required of a CFP® may be found by visiting the CFP® Board of Standard's website at <http://www.cfp.net/>.

Certified Student Loan Professional (CSLP®)

The CSLP® certification for licensed financial professionals is awarded by the [Certified Student Loan Advisors Institute](#). In order to earn and maintain the CSLP® designation, individuals must meet the initial certification components of (i) course completion, (ii) pass the CSLP Exam, (iii) complete all educational lessons that have been released or amended by the Board since the designee completed their course study, (iv) take and pass an Annual Recertification Exam, and (v) pay an annual renewal fee. Further information about the qualifications and standards

required of a CSLP® may be found by visiting the Certified Student Loan Advisors Institute's website at <https://cslainstitute.org/>.

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Simcha Terwilliger.

## Item 4: Other Business Activities

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- A. Simcha Terwilliger is not actively engaged in any other investment-related business or occupation.
- B. Simcha Terwilliger currently serves as a Student Loan Consultant at Student Loan Planner for which she spends approximately 20 hours per month providing student loan consulting.

## Item 5: Additional Compensation

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Simcha Terwilliger does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

## Item 6: Supervision

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Simcha Terwilliger is supervised and monitored by Travis Hornsby, President, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Travis Hornsby may be reached at (314) 301-8219.

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Daniel Rooker

Address: 555 South Mangum St  
Suite 100  
Durham, NC 27701

Phone: (314) 301-8219

Email: [dan@slpwealth.com](mailto:dan@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Daniel Rooker that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Daniel Rooker is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 6121324.



## Item 2: Educational Background & Business Experience

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Name: Daniel Joseph Rooker

Year of Birth: 1990

Education: BA, Physics  
Kenyon College  
2012

Business Background: Investment Advisor Representative  
SLP Wealth LLC  
Apr 2023 – Present

Student Loan Consultant  
Student Loan Planner  
March 2021 – Present

Owner and Consultant  
Rooker Consulting Services LLC  
Feb 2021 – Present

Principal and CCO  
Rook Financial LLC  
Feb 2021 – May 2023

Advisor  
Hightower Advisors  
Oct 2020 – Feb 2021

Advisor  
Private Vista LLC  
Mar 2018 – Sep 2020

Associate Advisor  
Clune & Associates, Ltd.  
May 2017 – Jan 2018

Associate Advisor  
The Next Level Planning Group  
Apr 2016 – Apr 2017

Wealth Manager Assistant  
Stratos Wealth Partners  
Oct 2012 – Mar 2016

Professional Designations: Certified Financial Planner ®

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain

occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications and standards required of a CFP® may be found by visiting the CFP® Board of Standard's website at <http://www.cfp.net/>.

#### Certified Student Loan Professional (CSLP®)

The CSLP® certification for licensed financial professionals is awarded by the [Certified Student Loan Advisors Institute](https://cslainstitute.org/). In order to earn and maintain the CSLP® designation, individuals must meet the initial certification components of (i) course completion, (ii) pass the CSLP Exam, (iii) complete all educational lessons that have been released or amended by the Board since the designee completed their course study, (iv) take and pass an Annual Recertification Exam, and (v) pay an annual renewal fee. Further information about the qualifications and standards required of a CSLP® may be found by visiting the Certified Student Loan Advisors Institute's website at <https://cslainstitute.org/>.

### Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Daniel Rooker.

### Item 4: Other Business Activities

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- A. Daniel Rooker is not actively engaged in any other investment-related business or occupation.
- B. Daniel Rooker is the owner of Rooker Consulting Services LLC and spends approximately 60 hours per month providing non-investment related consulting services.

Daniel Rooker is a Student Loan Consultant with Student Loan Planner. He spends approximately 40 hours per month on this business.

### Item 5: Additional Compensation

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Daniel Rooker does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

### Item 6: Supervision

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Daniel Rooker is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.

## Item 1: Cover Page

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for James Mwombela

Address: 555 South Mangum St  
Suite 100  
Durham, NC 27701

Phone: (314) 301-8219

Email: [james@slpwealth.com](mailto:james@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about James Mwombela that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about James Mwombela is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 6598762.

## Item 2: Educational Background & Business Experience

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Name: James Chigungu Mwombela

Year of Birth: 1992

Education: Bachelor's Degree in Economics and Political Science  
University of North Carolina Chapel Hill  
2014

Business Background:

- Investment Advisor Representative  
SLP Wealth LLC  
Apr 2023 – Present
- Student Loan Consultant  
Student Loan Planner  
Mar 2022 – Present
- Founder and CCO  
Mwombela Financial Planning LLC  
Nov 2021 – Mar 2023
- Investment Adviser Representative  
NorthAvenue, LLC  
Sep 2020 – Aug 2021
- Investment Adviser Representative  
GRID 202 Partners  
Jun 2019 – Sep 2020
- Registered Representative  
Cambridge Investment Research, Inc.  
Mar 2019 – May 2019
- Investment Adviser Representative  
Cambridge Investment Research Advisors, Inc.  
Oct 2018 – May 2019
- Financial Advisor & Medicare Planner  
Legacy Financial Group  
Sep 2018 – May 2019
- Administrative  
Cambridge Investment Research, Inc.  
Oct 2018 – Mar 2019
- Insurance Agent  
Insurance Advisor Associates, Inc.  
Sep 2017 – Sep 2018
- Investment Advisor Representative  
Cardinal Retirement Planning, Inc.  
Feb 2016 – Sep 2018
- Solicitor

Gradient Investments, LLC  
Feb 2016 – Sep 2018

Insurance Agent  
H.E. Scheil & Associates, Inc.  
May 2015 – Sep 2018

Professional Designations: Certified Financial Planner ®

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications and standards required of a CFP® may be found by visiting the CFP® Board of Standard's website at <http://www.cfp.net/>.

Certified Student Loan Professional (CSLP®)

The CSLP® certification for licensed financial professionals is awarded by the [Certified Student Loan Advisors Institute](https://cslainstitute.org/). In order to earn and maintain the CSLP® designation, individuals must meet the initial certification components of (i) course completion, (ii) pass the CSLP Exam, (iii) complete all educational lessons that have been released or amended by the Board since the designee completed their course study, (iv) take and pass an Annual Recertification Exam, and (v) pay an annual renewal fee. Further information about the qualifications and standards required of a CSLP® may be found by visiting the Certified Student Loan Advisors Institute's website at <https://cslainstitute.org/>.

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of James Mwombela.

## Item 4: Other Business Activities

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- A. James Mwombela is not actively engaged in any other investment-related business or occupation.
- B. James Mwombela is currently a Student Loan Consultant at Student Loan Planner, an investment-related firm for which he spends approximately 50 working hours per month providing student loan planning and advice.

## Item 5: Additional Compensation

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James Mwombela does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

## Item 6: Supervision

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James Mwombela is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.

## Item 1: Cover Page

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Scott McDonald

Address: 555 South Mangum St  
Suite 100  
Durham, NC 27701

Phone: (314) 301-8219

Email: [scotty@slpwealth.com](mailto:scotty@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Scott McDonald that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Scott McDonald is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 7767653.

## Item 2: Educational Background & Business Experience

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Name: Scott Thomas McDonald

Year of Birth: 1982

Education: Bachelor's Degree in Environmental Science  
San José State University  
2016

Business Background: Paraplanner  
SLP Wealth LLC  
May 2023 – Present

Student Loan Consultant  
Student Loan Planner  
May 2023 – Present

Assistant Land Surveyor  
Santa Clara Valley Water District  
Feb 2017 – Present

Scientific Aide  
California Department of Fish and Wildlife  
May 2015 – Jan 2018

Professional Designations: Certified Student Loan Professional (CSLP®)

The CSLP® certification for licensed financial professionals is awarded by the [Certified Student Loan Advisors Institute](https://cslainstitute.org/). In order to earn and maintain the CSLP® designation, individuals must meet the initial certification components of (i) course completion, (ii) pass the CSLP Exam, (iii) complete all educational lessons that have been released or amended by the Board since the designee completed their course study, (iv) take and pass an Annual Recertification Exam, and (v) pay an annual renewal fee. Further information about the qualifications and standards required of a CSLP® may be found by visiting the Certified Student Loan Advisors Institute's website at <https://cslainstitute.org/>.

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Scott McDonald.

## Item 4: Other Business Activities

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- A. Scott McDonald is not actively engaged in any other investment-related business or occupation.
- B. Scott McDonald is a Student Loan Consultant with Student Loan Planner. He spends approximately 24 hours per month on this business.



## Item 5: Additional Compensation

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Scott McDonald does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

## Item 6: Supervision

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Scott McDonald is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.

## Item 1: Cover Page

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Meredith Jones

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Suite 100  
Durham, NC 27701

Phone: (314) 301-8219

Email: [meredith@slpwealth.com](mailto:meredith@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Meredith Jones that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Meredith Jones is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 7681191.

## Item 2: Educational Background & Business Experience

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Name: Meredith Bailey Jones

Year of Birth: 1980

Education: Doctor of Veterinary Medicine  
North Carolina State University  
2008

Bachelor of Science in Zoology  
North Carolina State University  
2003

Business Background:

Financial Planner  
SLP Wealth LLC  
Jul 2023 – Present

Student Loan Consultant  
Student Loan Planner  
Jul 2023 – Present

Consultant/Speaker  
Dr. Meredith Jones, LLC  
Nov 2020 – Present

Co-Founder/CEO  
Veterinary Financial Summit, LLC  
Jun 2019 – Present

Investment Adviser Representative  
Vincere Wealth Management, LLC  
Jan 2023 – Jul 2023

Associate Financial Planner  
Vincere Wealth Management, LLC  
Aug 2022 – Jan 2023

Financial Wellness Program Manager & Emergency Veterinarian  
Veterinary Emergency Group  
Jul 2021 – May 2022

Emergency Veterinarian  
Veterinary Referral & Critical Care  
Aug 2009 – Sep 2020

Professional Designations: Certified Student Loan Professional (CSLP®)

The CSLP® certification for licensed financial professionals is awarded by the [Certified Student Loan Advisors Institute](#). In order to earn and maintain the CSLP® designation, individuals must meet the initial certification components of (i) course completion, (ii) pass the CSLP Exam, (iii) complete all educational lessons that have been released or amended by the Board since the designee completed their course study, (iv) take and pass an Annual Recertification Exam, and (v) pay an annual

renewal fee. Further information about the qualifications and standards required of a CSLP® may be found by visiting the Certified Student Loan Advisors Institute's website at <https://cslainstitute.org/>.

#### Accredited Financial Counselor (AFC®)

The Accredited Financial Counselor (AFC®) certification is awarded by the Association for Financial Counseling & Planning Education (AFCPE®). AFC® certification marks the highest standards of excellence in the field of financial counseling and education. The programs train professionals to guide clients through a holistic counseling framework of life cycle financial education. This allows the professional to provide a high-level, tailored approach based on the needs of each client to effectively analyze and create lasting financial behavior change. In order to obtain the AFC® certification, individuals must meet certain education requirements, pass the AFC® exam, complete 1,000 hours of financial counseling experience and submit an employment verification form, and sign and adhere to the AFC® Code of Ethics. In order to maintain the certification, individuals must submit an annual fee, meet the CEU requirements, and abide by the code of ethics.

### Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Meredith Jones.

### Item 4: Other Business Activities

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- A. Meredith Jones is not actively engaged in any other investment-related business or occupation.
- B. Meredith Jones currently serves as a Student Loan Consultant at Student Loan Planner for which she spends approximately 30 hours per month providing student loan consulting.

Meredith Jones is a consultant/speaker at Dr. Meredith Jones, LLC through which she performs speaking engagements, receives affiliate payments, and occasional consulting. Meredith spends approximately 2 hours per month on activities related to Dr. Meredith Jones, LLC.

Meredith Jones is the Co-Founder/CEO of Veterinary Financial Summit, LLC which hosts an annual financial conference and online community for veterinary professionals, a podcast, and occasional speaking engagements. She spends approximately 40 hours per month on activities related to Veterinary Financial Summit, LLC.

### Item 5: Additional Compensation

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Meredith Jones does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

### Item 6: Supervision

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Meredith Jones is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.

## Item 1: Cover Page

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Jacob Courtney

Address: 555 South Mangum St  
Suite 100  
Durham, NC 27701

Phone: (314) 301-8219

Email: [jake@slpwealth.com](mailto:jake@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Jacob Courtney that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Jacob Courtney is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 7282960.

## Item 2: Educational Background & Business Experience

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Name: Jacob Michael Courtney

Year of Birth: 1991

Education: BA, Accounting and Finance  
Ohio University  
2014

Business Background: Financial Advisor  
SLP Wealth LLC  
Oct 2023 – Present

Student Loan Consultant  
Student Loan Planner  
Jul 2023 – Present

Founder, Lead Planner and Chief Compliance Officer  
MillennialFP LLC  
Feb 2023 – Nov 2023

Registered Rep  
Ameriprise Financial Services, LLC  
Jul 2020 – Jan 2023

Business Analyst  
Strategy & Resources, LLC  
Sep 2014 - Jul 2020

Professional Designations: Certified Financial Planner ®

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications and standards required of a CFP® may be found by visiting the CFP® Board of Standard's website at <http://www.cfp.net/>.

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Jacob Courtney.

## Item 4: Other Business Activities

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- A. Jacob Courtney is not actively engaged in any other investment-related business or occupation.

- B. Jacob Courtney is a Student Loan Consultant with Student Loan Planner. He spends approximately 69 hours per month on this business.

## Item 5: Additional Compensation

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Jacob Courtney does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

## Item 6: Supervision

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Jacob Courtney is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to Firm Legal Name's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.

## Item 1: Cover Page

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Samantha Silberstein

Address: 555 South Mangum St  
Suite 100  
Durham, NC 27701

Phone: (314) 301-8219

Email: [sam@slpwealth.com](mailto:sam@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Samantha Silberstein that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Samantha Silberstein is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 6662504.



## Item 2: Educational Background & Business Experience

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Name: Samantha Wendy Silberstein

Year of Birth: 1993

Education: BA in Economics  
Temple University  
2016

Business Background: Financial Planner  
SLP Wealth LLC  
Dec 2023 - Present

Student Loan Consultant  
Student Loan Planner  
Jul 2023 – Present

Financial Consultant  
TIAA  
May 2020 – Nov 2023

Registered Representative  
TIAA CREF Individual & Institutional Services, LLC  
May 2020 – Nov 2023

Relationship Manager  
TD Ameritrade, Inc.  
Aug 2018 – Apr 2020

Professional Designations: Certified Financial Planner ®

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications and standards required of a CFP® may be found by visiting the CFP® Board of Standard's website at <http://www.cfp.net/>.

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Samantha Silberstein.

## Item 4: Other Business Activities

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- C. Although Samantha Silberstein is a licensed insurance agent, she does not actively sell insurance products.
- D. Samantha Silberstein is a Student Loan Consultant with Student Loan Planner. She spends approximately 16 hours per month on this business.

## Item 5: Additional Compensation

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Samantha Silberstein does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

## Item 6: Supervision

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Samantha Silberstein is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to Firm Legal Name's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.

## Item 1: Cover Page

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Angela Pack

Address: 555 South Mangum St  
Suite 100  
Durham, NC 27701

Phone: (314) 301-8219

Email: [angela@slpwealth.com](mailto:angela@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Angela Pack that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Angela Pack is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 7719899.

## Item 2: Educational Background & Business Experience

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Name: Angela Marie Pack

Year of Birth: 1985

Education: Certificate in Financial Planning, Financial Planning and Services  
Northwestern University  
2011

M.A.  
Wheaton College  
2011

Business Background: Financial Planner  
SLP Wealth LLC  
Nov 2023 - Present

Student Loan Consultant  
Student Loan Planner  
Sep 2023 - Present

Financial Advisor Assistant  
Kendall Wealth Partners  
Aug 2022 - Aug 2023

Financial Advisor Assistant  
Susan L. Kendall, CPA  
Aug 2022 - Aug 2023

Student  
Northwestern University  
Jan 2022 - Dec 2022

Director of Compassion Ministries  
Wellspring Church  
Sep 2020 - Dec 2022

High School Teacher  
St. Abraham's Classical Christian Academy  
Aug 2017 - Jan 2022

Professional Designations: Certified Student Loan Professional (CSLP®)

The CSLP® certification for licensed financial professionals is awarded by the [Certified Student Loan Advisors Institute](https://cslainstitute.org/). In order to earn and maintain the CSLP® designation, individuals must meet the initial certification components of (i) course completion, (ii) pass the CSLP Exam, (iii) complete all educational lessons that have been released or amended by the Board since the designee completed their course study, (iv) take and pass an Annual Recertification Exam, and (v) pay an annual renewal fee. Further information about the qualifications and standards required of a CSLP® may be found by visiting the Certified Student Loan Advisors Institute's website at <https://cslainstitute.org/>.

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Angela Pack.

## Item 4: Other Business Activities

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- A. Angela Pack is not actively engaged in any other investment-related business or occupation.
- B. Angela Pack is a Student Loan Consultant with Student Loan Planner. She spends approximately 65 hours per month on this business.

## Item 5: Additional Compensation

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Angela Pack does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

## Item 6: Supervision

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Angela Pack is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to Firm Legal Name's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.

## Item 1: Cover Page

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Meagan McGuire

Address: 1011 S Hamilton Road  
Suite 300  
Chapel Hill, NC 27517

Phone: (314) 301-8219

Email: [meagan@slpwealth.com](mailto:meagan@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Meagan McGuire that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Meagan McGuire is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 6367566.

## Item 2: Educational Background & Business Experience

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Name: Meagan Rae McGuire

Year of Birth: 1992

Education: BBA, Finance  
Kennesaw State University  
2015

Business Background: Investment Adviser Representative  
SLP Wealth LLC  
Dec 2023 – Present

Student Loan Consultant  
Student Loan Planner  
Nov 2019 – Present

Insurance Broker  
MassMutual Life Insurance Co.  
Mar 2018 – Present

Owner, CEO, Financial Coach  
MRLandress, Inc. dba Financial Coach Meagan  
Mar 2017 – Apr 2023

Settlement Consultant  
Ringler Associates  
Mar 2017 - Dec 2021

Registered Representative  
MML Investors Services, LLC  
Jul 2019 – Oct 2021

Registered Representative  
Spire Securities, LLC  
Feb 2018 – Dec 2018

Investment Advisor Representative  
Spire Wealth Management, LLC  
Feb 2018 – Dec 2018

Registered Representative  
MML Investors Services, LLC  
Jul 2014 – Mar 2017

Agent  
Massachusetts Mutual Life Insurance Co.  
Jan 2014 – Mar 2017

Professional Designations: Certified Student Loan Professional (CSLP®)

The CSLP® certification for licensed financial professionals is awarded by the [Certified Student Loan Advisors Institute](#). In order to earn and maintain the CSLP® designation, individuals must meet the initial

certification components of (i) course completion, (ii) pass the CSLP Exam, (iii) complete all educational lessons that have been released or amended by the Board since the designee completed their course study, (iv) take and pass an Annual Recertification Exam, and (v) pay an annual renewal fee. Further information about the qualifications and standards required of a CSLP® may be found by visiting the Certified Student Loan Advisors Institute's website at <https://cslainstitute.org/>.

Chartered Financial Consultant (ChFC®)

The [Chartered Financial Consultant](#) (ChFC®) designation is issued by [The American College](#). The ChFC® program covers a list of requirements for financial advisors, from knowledge on tax and retirement planning to special needs advising, wealth management, insurance, and more. The designation provides a baseline understanding of what it takes to be successful as a financial consultant. A candidate for designation must have three years of full-time business experience within the five years before the designation is awarded. Candidates must complete six core and two elective courses, agree to comply with The American College [Code of Ethics](#), pay all course and exam fees, and pass a proctored final exam for each course. Designates must complete 30 hours of continuing education every two years.

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Meagan McGuire.

## Item 4: Other Business Activities

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- A. Although Meagan McGuire is a licensed insurance agent, she does not actively sell insurance products.
- B. Meagan McGuire currently serves as a Student Loan Consultant at Student Loan Planner for which she spends approximately 45 hours per month providing student loan repayment consulting.

## Item 5: Additional Compensation

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Meagan McGuire does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

## Item 6: Supervision

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Meagan McGuire is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.



## Item 1: Cover Page

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Mary Rush

Address: 555 South Mangum St  
Suite 100  
Durham, NC 27701

Phone: (314) 301-8219

Email: [mary@slpwealth.com](mailto:mary@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Mary Rush that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Mary Rush is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 6200886.

## Item 2: Educational Background & Business Experience

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Name: Mary Rush

Year of Birth: 1986

Education: Certificate in Financial Planning  
New York University  
2013

Bachelor of Business Administration (B.B.A.), Finance, General  
Montclair State University  
2009

Business Background: Financial Planner  
SLP Wealth LLC  
Dec 2023 - Present

Student Loan Consultant  
Student Loan Planner  
Sep 2023 - Present

Company Tap Teacher  
Freehold Academy of Performing Arts  
Sep 2005 - Present

Company Dance Teacher  
In the Spotlight Dance Studio  
Sep 2004 - Present

Tap Teacher  
The Susten Dance Collective  
Oct 2020 - Aug 2023

Stash Planner  
Stash Wealth  
May 2016 - Sep 2018, Oct 2022 - Jul 2023

Professional Designations: Certified Financial Planner®

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications and standards required of a CFP® may be found by visiting the CFP® Board of Standard's website at <http://www.cfp.net/>.

### Certified Student Loan Professional (CSLP®)

The CSLP® certification for licensed financial professionals is awarded by the [Certified Student Loan Advisors Institute](#). In order to earn and maintain the CSLP® designation, individuals must meet the initial certification components of (i) course completion, (ii) pass the CSLP Exam, (iii) complete all educational lessons that have been released or amended by the Board since the designee completed their course study, (iv) take and pass an Annual Recertification Exam, and (v) pay an annual renewal fee. Further information about the qualifications and standards required of a CSLP® may be found by visiting the Certified Student Loan Advisors Institute's website at <https://cslainstitute.org/>.

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Mary Rush.

## Item 4: Other Business Activities

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- A. Mary Rush is not actively engaged in any other investment-related business or occupation.
- B. Mary Rush is not actively engaged in any other business or occupation for compensation that provides a substantial source of income or involves a substantial amount of time.

## Item 5: Additional Compensation

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Mary Rush does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

## Item 6: Supervision

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Mary Rush is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to Firm Legal Name's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.

## Item 1: Cover Page

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Kathleen Boyd

Address: 555 South Mangum St  
Suite 100  
Durham, NC 27701

Phone: (314) 301-8219

Email: [kathleen@slpwealth.com](mailto:kathleen@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Kathleen Boyd that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Kathleen Boyd is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 6608573.

## Item 2: Educational Background & Business Experience

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Name: Kathleen Brittany Boyd

Year of Birth: 1985

Education: MS, Financial Planning & Therapy  
Kansas State  
2019

MS Finance  
University of Utah  
2013

BS Economics  
University of Utah  
2013

Business Background: Financial Planner  
SLP Wealth LLC  
Jan 2024 - Present

Student Loan Consultant  
Student Loan Planner  
Sep 2023 - Present

Financial Planning & Process Coach  
XY Planning Network  
Mar 2021 - Sep 2023

Investment Adviser Representative  
Illumination Wealth Management  
Aug 2019 - Mar 2021

Instructor  
Kansas State University  
Jan 2019 - May 2019

Investment Adviser Representative  
Brunch & Budget, LLC  
Jan 2019 - Jan 2019

Professional Designations: Certified Financial Planner®

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications

and standards required of a CFP® may be found by visiting the CFP® Board of Standard's website at <http://www.cfp.net/>.

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Kathleen Boyd.

## Item 4: Other Business Activities

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- A. Kathleen Boyd is not actively engaged in any other investment-related business or occupation.
- B. Kathleen Boyd is a Student Loan Consultant for Student Loan Planner. She spends approximately 20-30 hours per week on this other business activity.

Kathleen Boyd is an Adjunct Professor at Oklahoma State University. She spends approximately 10 hours per week on this other business activity.

## Item 5: Additional Compensation

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Kathleen Boyd does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.

## Item 6: Supervision

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Kathleen Boyd is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to Firm Legal Name's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.

## Item 1: Cover Page

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# SLP Wealth LLC

## Form ADV Part 2B Brochure Supplement for Hermes Conesa

Address: 555 South Mangum St  
Suite 100  
Durham, NC 27701

Phone: (314) 301-8219

Email: [hermes@slpwealth.com](mailto:hermes@slpwealth.com)

Website: <https://slpwealth.com/>

This brochure supplement provides information about Hermes Conesa that supplements the SLP Wealth LLC brochure. You should have received a copy of that brochure. Please contact SLP Wealth LLC if you did not receive SLP Wealth LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Hermes Conesa is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 4803227.

## Item 2: Educational Background & Business Experience

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Name: Hermes Gustavo Conesa Barrionuevo

Year of Birth: 1978

Education: Master of Business Administration (MBA)  
Florida International University  
2015

Bachelor of Business Administration (BBA), Finance  
University of South Florida  
2003

Business Background: Financial Planner  
SLP Wealth LLC  
Dec 2023 - Present

Student Loan Consultant  
Student Loan Planner  
Aug 2023 - Present

Senior Consultant  
Feliciano Seda & Associates  
Sep 2022 - Dec 2023

Private Investor  
Amasa Panaderia & Cafe  
Jan 2020 - Feb 2023

Managing Director  
MD Tax and Business Advisors P.S.C.  
Mar 2017 - Dec 2021

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Hermes Conesa.

## Item 4: Other Business Activities

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- A. Although Hermes Conesa is a licensed insurance agent, he does not actively sell insurance products.
- B. Hermes Conesa is a Student Loan Consultant for Student Loan Planner. He spends approximately 60 hours per month on this other business activity.

## Item 5: Additional Compensation

---

Hermes Conesa does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through SLP Wealth LLC.



## Item 6: Supervision

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Hermes Conesa is supervised and monitored by Simcha Terwilliger, Chief Compliance Officer, pursuant to Firm Legal Name's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (267) 882-7409.