

SLP Wealth LLC

Form ADV Part 2B Brochure Supplement

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Item 1: Cover Page

SLP Wealth LLC

1. Form ADV Part 2B Brochure Supplement for Jared Costigan

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

Phone: (910) 315-0973

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 and by searching for CRD# 7399691.

Item 2: Educational Background & Business Experience

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 Designations¹: Certified Financial Planner (CFP)

Certified Student Loan Professional (CSLP)

Item 3: Disciplinary Information

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

A. Jared Costigan is not actively engaged in any other investment-related business or occupation.

¹ Please see [Exhibit A](#) for professional designation descriptions.

- 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

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

Jared Costigan is supervised and monitored by Conor Mahlmann, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Conor Mahlmann may be reached at (910) 315-0973.

Item 1: Cover Page

SLP Wealth LLC

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

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

Phone: (910) 315-0973

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 and by searching for CRD# 6820579.

Item 2: Educational Background & Business Experience

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 Designations²: Certified Student Loan Professional (CSLP)

Item 3: Disciplinary Information

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

- A. Benjamin Lacomis is not actively engaged in any other investment-related business or occupation.
- 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

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.

² Please see [Exhibit A](#) for professional designation descriptions.

Item 6: Supervision

Benjamin Lacomis is supervised and monitored by Conor Mahlmann, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Conor Mahlmann may be reached at (910) 315-0973.

SLP Wealth LLC

3. Form ADV Part 2B Brochure Supplement for Travis Hornsby

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

Phone: (910) 315-0973

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 and by searching for CRD# 6094394.

Item 2: Educational Background & Business Experience

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 Designations³: Chartered Financial Analyst (CFA)

Certified Financial Planner (CFP)

Item 3: Disciplinary Information

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

- A. Travis Hornsby is currently the owner of SLP Insurance LLC, an investment-related firm for which he spends approximately 10 working hours per month.
- B. 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.

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.

³ Please see [Exhibit A](#) for professional designation descriptions.

Item 5: Additional Compensation

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

Travis Hornsby is supervised and monitored by Conor Mahlmann, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Conor Mahlmann may be reached at (910) 315-0973.

SLP Wealth LLC

4. Form ADV Part 2B Brochure Supplement for Conor Mahlmann

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

Phone: (910) 315-0973

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 and by searching for CRD# 6435510.

Item 2: Educational Background & Business Experience

Name: Conor Michael Mahlmann

Year of Birth: 1992

Education: BS, Agricultural Economics
University of Arkansas
2013

Business Background:

- CCO
SLP Wealth LLC
May 2025 – Present
- Financial Planner
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

Professional Designations⁴: Certified Financial Planner (CFP)

Certified Student Loan Professional (CSLP)

Item 3: Disciplinary Information

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

- 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.

⁴ Please see [Exhibit A](#) for professional designation descriptions.

Item 5: Additional Compensation

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

Conor Mahlmann is supervised and monitored by Simcha Terwilliger, Partner and Chief Tax Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Simcha Terwilliger may be reached at (910) 315-0973.

SLP Wealth LLC

5. Form ADV Part 2B Brochure Supplement for Simcha Terwilliger

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

Phone: (910) 315-0973

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 and by searching for CRD# 6709279.

Item 2: Educational Background & Business Experience

Name: Simcha Shachar Terwilliger

Year of Birth: 1991

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

Business Background: Partner and Chief Tax Officer
SLP Wealth LLC
Apr 2023 – Present

CCO
SLP Wealth LLC
Sep 2023 – May 2025

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 Designations⁵: Certified Financial Planner (CFP)

Certified Student Loan Professional (CSLP)

Item 3: Disciplinary Information

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

- 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

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.

⁵ Please see [Exhibit A](#) for professional designation descriptions.

Item 6: Supervision

Simcha Terwilliger is supervised and monitored by Conor Mahlmann, CCO, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Conor Mahlmann may be reached at (910) 315-0973.

SLP Wealth LLC

6. Form ADV Part 2B Brochure Supplement for Scott McDonald

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

Phone: (910) 315-0973

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 and by searching for CRD# 7767653.

Item 2: Educational Background & Business Experience

Name: Scott Thomas McDonald

Year of Birth: 1982

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

Business Background: Financial Planner
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 Designations⁶: Certified Student Loan Professional (CSLP)

Item 3: Disciplinary Information

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

- 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

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.

⁶ Please see [Exhibit A](#) for professional designation descriptions.

Item 6: Supervision

Scott McDonald is supervised and monitored by Conor Mahlmann, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Conor Mahlmann may be reached at (910) 315-0973.

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SLP Wealth LLC

7. Form ADV Part 2B Brochure Supplement for Jacob Courtney

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

Phone: (910) 315-0973

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 and by searching for CRD# 7282960.

Item 2: Educational Background & Business Experience

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 Designations⁷:

- Certified Financial Planner (CFP)
- Certified Student Loan Professional (CSLP)

Item 3: Disciplinary Information

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

- 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

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.

⁷ Please see [Exhibit A](#) for professional designation descriptions.

Item 6: Supervision

Jacob Courtney is supervised and monitored by Conor Mahlmann, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Conor Mahlmann may be reached at (910) 315-0973.

SLP Wealth LLC

8. Form ADV Part 2B Brochure Supplement for Angela Pack

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

Phone: (910) 315-0973

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 and by searching for CRD# 7719899.

Item 2: Educational Background & Business Experience

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 Designations⁸: Certified Student Loan Professional (CSLP)

Item 3: Disciplinary Information

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

⁸ Please see [Exhibit A](#) for professional designation descriptions.

Item 4: Other Business Activities

- 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

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

Angela Pack is supervised and monitored by Conor Mahlmann, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Conor Mahlmann may be reached at (910) 315-0973.

SLP Wealth LLC

9. Form ADV Part 2B Brochure Supplement for Meagan McGuire

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

Phone: (910) 315-0973

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 and by searching for CRD# 6367566.

Item 2: Educational Background & Business Experience

Name: Meagan Rae McGuire

Year of Birth: 1992

Education: BBA, Finance
Kennesaw State University
2015

Business Background:

- Financial Planner
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 Designations⁹: Certified Student Loan Professional (CSLP)
Chartered Financial Consultant (ChFC)
Certified Financial Planner (CFP)

Item 3: Disciplinary Information

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

- 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

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

Meagan McGuire is supervised and monitored by Conor Mahlmann, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Conor Mahlmann may be reached at (910) 315-0973.

⁹ Please see [Exhibit A](#) for professional designation descriptions.

SLP Wealth LLC

10. Form ADV Part 2B Brochure Supplement for Kathleen Boyd

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

Phone: (910) 315-0973

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

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Additional information about Kathleen Boyd is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 6608573.

Item 2: Educational Background & Business Experience

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 Designations¹⁰: Certified Financial Planner (CFP)

Certified Student Loan Professional (CSLP)

Item 3: Disciplinary Information

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

¹⁰ Please see [Exhibit A](#) for professional designation descriptions.

Item 4: Other Business Activities

- 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

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

Kathleen Boyd is supervised and monitored by Conor Mahlmann, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Conor Mahlmann may be reached at (910) 315-0973.

Item 1: Cover Page

SLP Wealth LLC

11. Form ADV Part 2B Brochure Supplement for David Aizuss

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

Phone: (910) 315-0973

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

This brochure supplement provides information about David Aizuss 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 David Aizuss is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 7913233.

Item 2: Educational Background & Business Experience

Name: David Albert Aizuss

Year of Birth: 1995

Education: Bachelor's Degree in Economics
Willamette University
2017

Business Background:

- Financial Planner
SLP Wealth LLC
May 2024 - Present
- Student Loan Consultant
Student Loan Planner
Nov 2023 - Present
- Mortgage Loan Officer
United Mortgage Lending LLC
Jan 2023 - Present
- Paraplanner
SLP Wealth LLC
Jan 2024 - May 2024
- Mortgage Loan Officer
Prospect Financial Group, Inc.
Jan 2021 - Oct 2022
- Music Teacher/Director of Sales
RiverCity Rock Star Academy
May 2016

Professional Designations¹¹: Certified Student Loan Professional (CSLP)

Item 3: Disciplinary Information

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

Item 4: Other Business Activities

- A. David Aizuss is a Mortgage Loan Officer for United Mortgage Lending LLC. He spends minimal time on this other business activity. David Aizuss' mortgage activities are not conferred to SLP Wealth LLC. Clients are under no obligation to utilize David Aizuss as their mortgage broker; however, if they do, he will receive a commission in that capacity.
- B. David Aizuss is a Student Loan Consultant for Student Loan Planner. He spends approximately 40 hours per month on this other business activity.

¹¹ Please see [Exhibit A](#) for professional designation descriptions.

Item 5: Additional Compensation

David Aizuss 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

David Aizuss is supervised and monitored by Conor Mahlmann, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Conor Mahlmann may be reached at (910) 315-0973.

SLP Wealth LLC

12. Form ADV Part 2B Brochure Supplement for Connor Pierce

Address: 555 South Mangum St
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Durham, NC 27701

Phone: (910) 315-0973

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

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Additional information about Connor Pierce is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 7971579.

Item 2: Educational Background & Business Experience

Name: Connor Scott Pierce

Year of Birth: 1994

Education: Doctorate of Physical Therapy
Lebanon Valley College
2018

Bachelor's Degree Health Science
Lebanon Valley College
2016

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

Student Loan Consultant
Student Loan Planner
Aug 2023 - Present

Founder
After the DPT, LLC
Jan 2022 - Present

Paraplanner
SLP Wealth LLC
Dec 2023 - Aug 2024

Clinic Director & Physical Therapist
Madden & Gilbert Physical Therapy
Mar 2023 - Oct 2023

Physical Therapist
Madden Physical Therapy
Jun 2018 - Mar 2023

Lab Instructor
Lebanon Valley College
Aug 2019 - Dec 2021

Professional Designations¹²: Certified Student Loan Professional (CSLP)

Item 3: Disciplinary Information

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

¹² Please see [Exhibit A](#) for professional designation descriptions.

Item 4: Other Business Activities

- A. Connor Pierce is not actively engaged in any other investment-related business or occupation.
- B. Connor Pierce is a Student Loan Consultant for Student Loan Planner. He spends approximately 50 hours per month on this other business activity.

Item 5: Additional Compensation

Connor Pierce 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

Connor Pierce is supervised and monitored by Conor Mahlmann, Chief Compliance Officer, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Conor Mahlmann may be reached at (910) 315-0973.

Item 1: Cover Page

SLP Wealth LLC

13. Form ADV Part 2B Brochure Supplement for Samantha Heflin

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

Phone: (910) 315-0973

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

This brochure supplement provides information about Samantha Heflin 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 Heflin is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 7787291.

Item 2: Educational Background & Business Experience

Full Name: Samantha Lynn Heflin

Year of Birth: 1999

Post-Secondary Education: Master of Science - MS, Financial Planning
University of Georgia
2021

Bachelor of Science - BS, Financial Planning
University of Georgia
2020

Business Background: Financial Planner
SLP Wealth
June 2025 – Present

Resident Financial Planner
Apella Capital, LLC d/b/a Apella Wealth
July 2023 – June 2025

Financial Planning Resident
Inspired Financial
June 2021 – June 2023

Bus Operator
University of Georgia Transportation Services
Oct 2018 – May 2021

Professional Designations¹³: CERTIFIED FINANCIAL PLANNER® professional

Item 3: Disciplinary Information

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

Item 4: Other Business Activities

- A. Samantha Heflin is not actively engaged in any other investment-related business or occupation.
- B. Samantha Heflin 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

Samantha Heflin 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.

¹³ Please see [Exhibit A](#) for professional designation descriptions.

Item 6: Supervision

Samantha Heflin is supervised and monitored by Conor Mahlmann, CCO, pursuant to SLP Wealth LLC's written policies and procedures and code of ethics. Meagan McGuire may be reached using the contact information on the cover page of this brochure supplement.

Exhibit A: Professional Designations Descriptions

Accredited Financial Counselor (AFC)

Prerequisites

Candidate must complete the following:

- 1,000 hours of financial counseling experience
- Submit three letters of reference attesting to professional competence and experience

Designation Training Requirements

Meet the educational requirement by selecting any of the following AFC Education Pathways:

- Self-Paced Study
- Financial Education Challenge
- Professional Designation Challenge
- AFCPE Approved Education Program

Designation Exam Type

- Final certification exam (online at testing center, closed book, proctored)

Continuing Education Requirements

- 30 hours every two years

Chartered Financial Analyst (CFA)

Prerequisites

Candidates must:

- meet one of the following requirements prior to enrollment in the CFA Program:
 1. hold a bachelor's or equivalent degree from a college/university;
 2. be within 11 months of the graduation month for a bachelor's degree or equivalent program by the date of sitting for the Level I exam; or
 3. have a combination of 4,000 hours of work experience and/or higher education that was acquired over a minimum of three sequential years by the date of enrolling for the Level I exam;
- have 4,000 hours of qualified work experience in the investment decision-making process (accrued before, during, or after participation in the CFA Program); and
- submit two-to-three professional reference letters.

Designation Training Requirements

- Self-study program

Designation Exam Type

- Three in-person, proctored, closed-book, computer-based exams

Continuing Education Requirements

None

CERTIFIED FINANCIAL PLANNER™ professional

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board’s other certification marks (the “CFP Board Certification Marks”). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.CFP.net.

CFP® professionals have met CFP Board’s high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirements through other qualifying credentials. CFP Board implemented the bachelor’s degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor’s or higher degree or completed a financial planning development capstone course.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the *Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement* and agree to be bound by CFP Board’s *Code of Ethics and Standards of Conduct (“Code and Standards”)*, which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board’s *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional’s services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Chartered Financial Consultant (ChFC)

Prerequisites

Candidates must have:

- three years of full-time business experience within the five years preceding the awarding of the designation; and
- a high school diploma or the equivalent.

Designation Training Requirements

- Eight online, self-study courses

Designation Exam Type

- Closed-book, proctored final course exams

Continuing Education Requirements

- 30 hours every two years, including one hour of ethics CE

Certified Student Loan Professional (CSLP)

Prerequisites

- Two years of industry experience in financial services OR a Bachelor's degree in business or finance from an accredited college or university **AND**
- Hold a license and/or registration in a regulated financial services industry (brokerage, investment adviser services, insurance).

Designation Training Requirements

- Multi-module self-study

Designation Exam Type

- Final certification exam (online, proctored)

Continuing Education Requirements

- Yes. Typically, annual completion of video module(s)