JAMES W. BRYAN, CFP®, ChFC®, ChSNC®

This brochure provides supplemental information about James W. Bryan. This supplements the Hyland Lake Partners ADV Part 2A brochure, which should have also been provided to you. Please contact us at (952) 658-6226 or by email at info@hylandlakepartners.com if you have any questions or wish to request a copy of the ADV Part 2A brochure.

Additional information about Hyland Lake Partners is also available at the SEC's website www.adviserinfo.sec.gov (select "firm" and type in our firm name). Results will provide you both Part 1 and 2 of our Form ADV.

ITEM 1–COVER PAGE BROCHURE ADVPART 2B

March 4, 2026

INDIVIDUAL CRD#
Hyland Lake Partners
7401 Metro Blvd #555
Edina, MN 55439
info@hylandlakepartners.com
(952) 658-6226

ITEM 2–EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

James W. Bryan , CFP®, ChFC®, ChSNC®
Year Born: 1967

Educational Background:
Bachelor of Landscape Architecture, Texas Tech University (1992)

Business Background:
09/2024 – Present: *Managing Member, CCO,* Hyland Lake Partners
07/2024 – 09/2024: *Investment Advisor Representative,* NWAM, LLC dba Northwest Asset Management
01/2009 – 07/2024: *Principal – Wealth Management,* Cahill Financial Advisors, Inc
01/2007 – 07/2024: *Representative,* Bluestone Wealth Strategies

Professional Designations:
CERTIFIED FINANCIAL PLANNER® (CFP®)
Chartered Financial Consultant® (ChFC®)
Chartered Special Needs Consultant® (ChSNC®)

Explanation of Designations:

CERTIFIED FINANCIAL PLANNER® (CFP®)

The CERTIFIED FINANCIAL PLANNER®, CFP® and federally registered professional certification marks (collectively, the “CFP® marks”) are granted by the United States by Certified Financial Planner Board of Standards, Inc. (“CFP® Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold a CFP® certification. To attain the right to use the CFP® designation, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and as of January 2007, attain a bachelor’s degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and Client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances.
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year).
- Ethics – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals. Individuals who become certified must complete ongoing education and ethics requirements to maintain the right to continue to use the CFP® marks. This requires 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain

competence and keep up with developments in the financial planning field; and renewal of an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients. CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Chartered Financial Consultant® (ChFC®)

The ChFC® designation is issued by The American College of Financial Services. The program offers comprehensive education in the essentials of financial planning, including insurance, taxation, retirement, and estate planning. It also addresses advanced areas such as behavioral finance, non-traditional family structures, and small business planning.

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

To receive the designation, candidates must complete eight online self-study courses, pass a final course exam, and agree to comply with The American College Code of Ethics and Procedures.

Designees must complete 30 credit hours of Continuing Education every two years to maintain the designation and participate in the annual Professional Recertification Program to maintain the designation.

ChFC® designation holders are subject to disciplinary rules and procedures, including a customer complaint process.

Chartered Special Needs Consultant® (ChSNC®)

The ChSNC® designation is issued by The American College of Financial Services and offers comprehensive education on financial planning for special needs individuals, their families, and caregivers.

Qualification for the ChSNC® program is at least five years of professional experience in financial services or law practice (focusing on income tax or estate planning) or otherwise four years of relevant professional financial services experience and a degree from a regionally accredited institution.

The ChSNC® designation program consists of three self-study courses. Client-facing designees must complete 30 credit hours of Continuing Education every two years and participate in the annual Professional Recertification Program to maintain the designation.

ChSNC® designation holders are subject to disciplinary rules and procedures, including a customer complaint process.

ITEM 3–DISCIPLINARY INFORMATION

James W. Bryan has no legal or disciplinary events that are material to you or a prospective client's evaluation of this advisory business.

ITEM 4–OTHER BUSINESS ACTIVITIES

The principal business of James W. Bryan is that of an investment advisor representative and provider of financial planning services.

James W. Bryan is also the owner of Bluestone Wealth Strategies, a corporation he utilizes for payroll purposes. He spends approximately 2 hours per month on this activity, none of which occurs during securities trading hours.

ITEM 5–ADDITIONAL COMPENSATION

Other than work with Hyland Lake Partners and any disclosures made in Items 2 and 4 above, James Bryan Jr receives no additional compensation related to outside business activities.

ITEM 6–SUPERVISION

James W. Bryan is the sole managing member of Hyland Lake Partners and is the supervising authority. James W. Bryan remains aware of and keeps us in compliance with the current rules and regulations put forth by each ruling regulatory authority where we conduct our business.

James W. Bryan is located at 7401 Metro Blvd #555 Edina, MN 55439 and can be reached by calling (952) 658-6226.

ITEM 7 - REQUIREMENTS FOR STATE-REGISTERED ADVISERS

Other than any disclosures made in Item 3 above, James W. Bryan has not been found liable in any additional material arbitration or liable in a civil, self-regulatory organization, or administrative proceeding.

James W. Bryan has never been the subject of a bankruptcy petition.