

This brochure supplement provides information about Sally Jane Boyle that supplements the SJ Boyle Wealth Planning, LLC brochure. You should have received a copy of that brochure. Please contact Sally Jane Boyle if you did not receive SJ Boyle Wealth Planning, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Sally Jane Boyle is also available on the SEC's website at www.adviserinfo.sec.gov.

SJ Boyle Wealth Planning, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Sally Jane Boyle

Personal CRD Number: 1026790

Investment Adviser Representative

SJ Boyle Wealth Planning, LLC

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NH 03755

(603) 277-9953

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UPDATED 1/01/2026

Item 2: Educational Background and Business Experience

Name: Sally Jane Boyle **Born:** 1954

Educational Background and Professional Designations:

Education:

BSBA Business, West Virginia University - 1976

Designations:

CFP® - Certified Financial Planner

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in 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 CFP® certification. It is recognized in the United States and several other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, 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 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, administered in 10 hours over a two-day period, 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); and
- 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 the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – Complete 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
- ii. Ethics – Renew 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.

CDFA® Divorce Financial Planning

CDFA® Divorce Financial Planning is the application of the discipline of financial planning to settlement strategies in divorce. The process requires the synthesis of tax, insurance, retirement, and other areas of knowledge with their specific application to divorce. The eligibility requirements were established by the Board of Advisors and reflect the fact that this is not an entry-level designation but an advanced program.

To attain the right to use the CDFA® marks, an individual must satisfactorily fulfill the following requirements:

A Bachelor's Degree with three years of on-the job experience

Experience has been defined as the following:

- Financial Planning
- Family Law Practice or
- Three or more of the following:
 - Experience with the tax code
 - Investment advisory or management
 - Real Estate, mortgage, and reverse mortgage lending
 - Life and disability insurance
 - Financial therapist or coach
- To assure continuing competency in tax codes, legislative and other ongoing developments in the field of divorce financial planning, you must report 30 hours of divorce-related continuing education every two years.

CSRIC® Chartered SRI Counselor

CSRIC® Chartered SRI Counselor is a designation for financial professionals. This program provides experienced financial advisors and investment professionals with a foundation knowledge of the history, definitions, trends, portfolio construction principles, fiduciary responsibilities, and best practices for sustainable, responsible, and impact (SRI) investments.

To maintain authorized use of the credential, designees are required to complete 16 continuing education credits* every two years.

The **Standards of Professional Conduct** establishes minimum standards of acceptable professional conduct for persons authorized to use this designations.

ChFC®- Chartered Financial Consultant®

ChFC® MINIMUM QUALIFICATIONS:

- Bachelor's degree or its equivalent, in any discipline, from an accredited university, this qualifies as one year of business experience
- Three years of full-time business experience is required; this three-year period must be within the five years preceding the date of the award (part-time qualifying business experience is also credited toward the three-year requirement with 2,000 hours representing the equivalent of one year full-time experience).
- Must fulfill the ChFC® seven course curriculum, as well as two additional elective courses
- Pass the exams for all required and elective courses
- Pass a background check and candidate fitness standards test. You must reveal any criminal history, pending litigation or ethical violations. The CFP board verifies all employment history, qualifications, and disciplinary issues via FINRA's Central Registration Depository.

Business Background:

09/2011 - Present	Principal SJ Boyle Wealth Planning LLC
01/2011 - 01/2014	Financial Advisor Purshe Kaplan Sterling Investments
10/2007 - 12/2010	Financial Advisor Citigroup Global Markets Inc.
09/2007 - 12/2010	Financial Advisor Morgan Stanley Smith Barney
04/2005 - 10/2007	Financial Advisor Chittenden Bank

Item 3: Disciplinary Information

Due to an administrative oversight, SJ Boyle Wealth Planning, LLC did not timely register in the State of Vermont when the firm level of clients exceeded the de minimis level as defined by V.S.A. § 5403 and § 5404 which resulted in a violation. To resolve this matter SJ Boyle Wealth Planning LLC entered into a stipulation and consent order with the State of Vermont and paid a fine.

Item 4: Other Business Activities

Sally Jane Boyle is a Trustee of Trust Funds of Hanover NH, she serves, along with two other Trustees, to advise the terms of the Investment Policy Statement and the conformance of those funds under our supervision to this policy statement. I also oversee with those same two Trustees that the distribution of the same funds is in accordance to the original Grantor documents. I receive no compensation for this work.

Item 5: Additional Compensation

Sally Jane Boyle does not receive any economic benefit from any person, company, or organization, other than SJ Boyle Wealth Planning, LLC in exchange for providing clients advisory services through SJ Boyle Wealth Planning, LLC.

Item 6: Supervision

As the only owner and representative of SJ Boyle Wealth Planning, LLC, Sally Jane Boyle supervises all activities of the firm. Sally Jane Boyle's response information is on the cover page of this disclosure document. Sally Jane Boyle adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.

Item 7: Requirements for State Registered Advisers

This disclosure is required by New Hampshire and Vermont state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.

A. Sally Jane Boyle has NOT been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or e) dishonest, unfair, or unethical practices.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or e) dishonest, unfair, or unethical practices.

B. Sally Jane Boyle has NOT been the subject of a bankruptcy petition in the past ten years.