



Form ADV Part 2B – Brochure Supplement

for

**Jason E. Reagan, CFP®
Financial Planner**

Effective: August 30, 2023

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Jason E. Reagan, CFP® (CRD# 6293199) in addition to the information contained in the Leading Edge Financial Planning LLC (“LEFP” or the “Advisor”, CRD# 277149) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the LEFP Disclosure Brochure or this Brochure Supplement, please contact us at 865-240-2292.

Additional information about Mr. Reagan is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 6293199.

Item 2 – Educational Background and Business Experience

Jason E. Reagan, born in 1970, is dedicated to advising Clients of LEFP as a Financial Planner. Mr. Reagan earned a Bachelor's degree in Civil Engineering from University of Tennessee in 1993. Mr. Reagan also earned a Master's degree in Civil Engineering from Virginia Tech in 1996. Information regarding Mr. Reagan's employment history is included below.

Employment History:

Financial Planner, Leading Edge Financial Planning LLC	09/2020 to Present
Pilot, NetJets Aviation	09/2007 to Present
Financial Advisor, Edward Jones	01/2014 to 01/2016
Pilot, USAF Reserve/ANG	08/1993 to 10/2018

CERTIFIED FINANCIAL PLANNER™ (“CFP®”)

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 a number of 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 87,000 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 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:

- *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
- *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®

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Mr. Reagan. Mr. Reagan has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Reagan.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Reagan.***

However, we do encourage you to independently view the background of Mr. Reagan on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 6293199.

Item 4 – Other Business Activities

Mr. Reagan is a pilot for NetJets Aviation, which is a private aviation provider. Mr. Reagan spends approximately 40 hours per week during trading hours on this activity.

Item 5 – Additional Compensation

Mr. Reagan has additional business activities where compensation is received that are detailed in Item 4 above.

Item 6 – Supervision

Mr. Reagan serves as a Financial Planner of LEFP and is supervised by Charles Mattingly, the Chief Compliance Officer. Mr. Mattingly can be reached at 865-240-2292.

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