

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

Additional information about Daniel Hamilton Evans is also available on the SEC's website at www.adviserinfo.sec.gov.

Ridgeline Wealth Planning LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Daniel Hamilton Evans

Personal CRD Number: 7584869

Investment Adviser Representative

Ridgeline Wealth Planning LLC
1700 Lyons Road, Suite B
Centerville, OH 45458
(937) 739-3744
dan@ridgelinewealthplanning.com

UPDATED: 12/12/2024

Item 2: Educational Background and Business Experience

Name: Daniel Hamilton Evans

Born: 2001

Educational Background and Professional Designations:

Education:

Bachelor of Science in Finance Business, Cedarville University - 2022

Business Background:

06/2022 - Present	Investment Adviser Representative Ridgeline Wealth Planning LLC
05/2022 - 06/2022	Client Success Specialist Ridgeline Wealth Planning
08/2021 - 05/2022	Finance Team Executive Cedarville University
05/2020 - 08/2021	Cashier Bernard's Garden Center
05/2018 - 05/2020	Cashier B&K Farm Market
08/2019 - 05/2022	Student Cedarville University
08/2015 - 05/2019	Student Lakeview High School

Professional 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 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.

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:

- 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.

Item 3: Item 3: Disciplinary Information

There are no legal or disciplinary events such as criminal or civil actions; administrative or self-regulatory organization proceedings; or any other hearing or formal adjudication regarding a professional attainment, designation, or license that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Daniel Hamilton Evans is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

Daniel Hamilton Evans does not receive any economic benefit from any person, company, or organization, other than Ridgeline Wealth Planning LLC in exchange for providing clients advisory services through Ridgeline Wealth Planning LLC.

Item 6: Supervision

As a representative of Ridgeline Wealth Planning LLC, Daniel Hamilton Evans is supervised by Scott Simons, the firm's Chief Compliance Officer. Scott Simons is responsible for ensuring that Daniel Hamilton Evans adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Scott Simons is (937) 739-3744.