



**Firm Brochure Supplement  
Form ADV Part 2B**

9040 Town Center Parkway  
Lakewood Ranch, FL 34202  
(941) 800-5955

This brochure supplement provides information about Brian Pope, that supplements the Pope Wealth Management brochure. You should have received a copy of that brochure. Please contact Brian Pope, President, if you did not receive Pope Wealth Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Brian Pope is available at on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Brian Pope, MBA, CFP® – Items 2 through 7**

### **Item 2 – Educational Background and Business Experience**

Brian Pope, President

Year of Birth: 1973

#### **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](http://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 requirement 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.

Education:

Mr. Pope received his Master of Business Administration for the University of Georgia in 2002 and Bachelor of Science in Business Administration (major in Finance) in 1995.

Mr. Pope received Certificate of Financial Planning at the American College for Financial Services in 2023.

Business Experience: Mr. Pope started his own financial planning firm in 2011, Pope Financial Planning, which he later merged with Emergent Investor Services in 2015 and with Dale K Ehrhart in 2017. In this capacity, Mr. Pope helps clients with financial planning services, ranging from portfolio management to life planning. Mr. Pope started Mulligan Financial Group in 2020.

Licenses: Mr. Pope holds the Series 65 license since October 2011.

**Item 3 – Disciplinary Information**

There are no applicable legal or disciplinary events relating to Mr. Pope.

**Item 4 – Other Business Activities**

**Item 5 – Additional Compensation**

Mr. Pope does not receive economic benefits from third parties who are not clients for providing advisory services.

**Item 6 – Supervision**

As a single member firm, Mr. Pope serves as President, Managing Member and Director of Compliance.

**Item 7 – Requirements for State-Registered Advisers**

Mr. Pope has not been found liable in any arbitration claims. Mr. Pope has not been found liable in any civil or self-regulatory organization or administrative proceeding. Mr. Pope has not been the subject of any bankruptcy petitions.