

Item 1 – Cover Page

Donalies Financial Planning, LLC

Charles E. Donalies, Principal

52 R Street, NW

Washington, DC 20001

Phone: 240.888.2573

www.donaliesfp.com

chuck@donaliesfp.com

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This brochure supplement provides information about Charles E. Donalies that supplements the Donalies Financial Planning, LLC brochure. You should have received a copy of that brochure. Please contact Charles E. Donalies if you did not receive Donalies Financial Planning, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Donalies Financial Planning, LLC is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Educational Background and Business Experience

Donalies Financial Planning, LLC (“DFP”) has one employee whose background is as follows:

Charles E. Donalies, CFP®, President, founder and sole Principal. Mr. Donalies founded DFP in April 2012. Mr. Donalies was born on December 27, 1975 in Cleveland, Ohio. Mr. Donalies’ educational background includes a B.S. in Kinesiology from the University of Maryland at College Park and a M.B.A. from Johns Hopkins University. He earned the Certified Financial Planner™ designation in January of 2011. Prior to founding DFP, Mr. Donalies worked at Investment Planning Associates, Inc. (2006 – 2012), a boutique financial planning firm based in Rockville, Maryland.

Explanation of “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. 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:

- 1) 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;
- 2) 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;
- 3) Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- 4) 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:

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Part 2B of Form ADV – Firm Brochure

- 1) Continuing Education – Complete 30 hours of continuing education 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
- 2) 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 – Disciplinary Information

Charles E. Donalies, President of DFP, has not been the subject of any disciplinary action.

Item 4 – Other Business Activities

DFP, nor its officers or employees is engaged in any other business than the financial planning and investment management services described in detail in the brochure ADV Part 2A.

DFP, nor its officers or employees, does not receive any form of compensation, monetary or otherwise, based on the sale of securities or other investment products.

Item 5 – Additional Compensation

DFP nor its officers or employees receives no additional compensation of any kind beyond the management fees described in ADV Form Part 2A.

Item 6 – Supervision

All activities of DFP are supervised by Charles E. Donalies, President. Mr. Donalies is responsible for and reviews all investment recommendations, portfolio construction and financial planning advice prior to it being given to a client.

Mr. Donalies is the Chief Compliance Officer of DFP. Mr. Donalies’ direct telephone number is 240.888.2573.

Mr. Donalies is the supervisor responsible for ensuring that all investment advisor representatives of DFP are in compliance with state regulations. DFP will maintain a compliance manual to ensure that DFP and its staff are in compliance with the District of Columbia Security Division’s rules and regulations.

Item 7 – Requirement for State Registered Advisors

There have been no disciplinary actions against Charles E. Donalies, President of DFP. Charles E. Donalies has never declared bankruptcy.