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BOULEVARD WEALTH MANAGEMENT, INC.

Form ADV 2B – Aaron Kolkman

REVISED AS OF December 23, 2020

Boulevard Wealth Management, Inc.

6500 City West Parkway #325

Eden Prairie, MN 55344

(877) 664-2583 / (877) 670-2583 Fax

www.boulevardwealth.com

This Brochure provides information about the education, experience and general background of Aaron Kolkman, MSF, CFP®, CKA® related to his affiliation with Boulevard Wealth Management, Inc. ("BOULEVARD") as an Investment Advisory Representative (IAR). If you have any questions about the contents of this Brochure, please contact us at (877) 664-2583. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission ("SEC") or by any state securities authority. This information has been filed with each state requiring such information related to BOULEVARD and its IARs.

Additional information about BOULEVARD (CRD No. 164423), including a copy of its Form ADV Part 1, is available on the SEC's website at www.adviserinfo.sec.gov.

Revised December 23, 2020



Item 2 – Educational Background & Business Experience

EDUCATION

Bachelor of Arts (1995 - 1999), University of St. Thomas

Master of Science, Finance (2013-2017), College for Financial Planning

CERTIFIED FINANCIAL PLANNER™ Curriculum (2003 - 2012), CFP Board License # 178858

ACCREDITED ASSET MANAGEMENT SPECIALIST™ Curriculum (2011 – 2012), College for Financial Planning

RECENT EXPERIENCE

IAR, Boulevard Wealth Management (2020-Present)

Director of Operations, IAR, Boulevard Wealth Management (2016-2019)

Advanced Planning Director, IAR, Boulevard Wealth Management (2008 – 2015)

VP, Development, Private Wealth Management (2009 – 2010)

OTHER EXPERIENCE

Associate VP (November 2004 – November 2008), M&I Wealth Management

Personal Investment Officer (February 2004 – November 2004), BBVA Compass

Sr. Financial Representative (October 2003 – February 2004), Banc One Securities

Internal Wholesaler (July 2002 – July 2003), American Express Financial Advisors



A Master of Science graduate from the College for Financial Planning is able to demonstrate competence in the following areas after completing the degree: • Knowledge of the terms, facts, concepts, and theories in financial planning. • The ability to analyze arguments, case studies, and issues. • The aptitude to use logical reasoning patterns and an understanding of the underlying assumptions and biases of positions. • The ability to identify weak / unsound arguments. • Confidence in their ability to evaluate methods and materials native to financial planning. • Appreciation of emerging issues and important contributions that have been made in each area of financial planning.



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, there are only 69,000 individuals have obtained CFP® certification in the world (<http://www.cfp.net/media/profile.asp>).

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:

- 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.
- Effective June 30, 2020, CFP® professionals are required to adhere to the Revised Code of Conduct and Practice Standards provided by the CFP Board. Accordingly, the websites relevant to searching a CFP® professional's public history and any personal or business bankruptcy where the CFP® professional was a Control Person are: www.brokercheck.finra.org, www.adviserinfo.sec.gov, www.letsmakeaplan.org, and www.cfp.net/verify-a-cfp-professional

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.



Certified Kingdom Advisor® is a designation granted by Kingdom Advisors®, Inc. to individuals who have demonstrated themselves to be:

- Believers in Jesus Christ by pledging agreement with the Kingdom Advisors® statement of faith and providing a personal testimony of accepting Jesus Christ as their Lord and Savior.
- Able to Apply Biblical Wisdom in Counsel by participating in the Certified Kingdom Advisor® Educational Program, as well as ongoing training offerings, and committing to incorporate biblical principles in their financial advice.
- Technically Competent by providing evidence of an approved professional designation (varying by discipline) or having at least 10 years full-time experience in their discipline
- Ethical and of Integrity by agreeing to espouse and practice the Kingdom Advisors® Code of Ethics and maintain active local church involvement, as well as providing pastoral and client letters of reference.
- Biblical Stewards by pledging that they practice biblical stewardship in their personal and professional life and give regularly in proportion to their income.

Item 3 –Disciplinary Information

None of our advisory representatives has any disciplinary history.



Item 4 – Other Business Activities

Aaron Kolkman is a Life/Health insurance agent [MN Resident Agent License # 20257232, National Insurance Producer Registry (NIPR) #6931578], and as such may receive commissions for the sale of the following lines of insurance: Life, Disability, and Long-term Care. General activities include general estate planning, trust funding, business succession planning, and deferred compensation structuring.

Aaron Kolkman is the owner of Fidere Media, LLC, which holds the copyright, distribution, and other rights and trademark for The Life Cycle of Wealth™ materials. Fidere Media also conducts business as a provider of web, radio, and other associated with the financial services industry. Fidere Media, LLC is unrelated to the business of BOULEVARD.

Item 5 – Additional Compensation

Aaron Kolkman's employee IAR payout schedule is maintained according to his independent advisor agreement with BOULEVARD.

As a shareholder of BOULEVARD, Aaron Kolkman may receive certain benefits which include (but are not limited to): bonuses calculated based upon overall revenue growth (not business line specific), shareholder loans/draws, health insurance benefits, profit-sharing, transportation, and meals/entertainment expense reimbursements.

Item 6 – Supervision

Troy Noor is the Designated Compliance Person for BOULEVARD and is therefore responsible for maintaining compliance supervision of the firm and all its associates. Troy Noor may be reached directly at (877) 664-2583 ext.601..

Item 7 – Requirements for State-Registered Advisers

The State of Minnesota requires a \$25,000 surety bond for advisors who have discretionary authority over client accounts, which is the case with BOULEVARD. Discretion means BOULEVARD selects investments for client accounts and conduct trades in client accounts. In addition, the firm must have a supervisory person who has significant industry experience. Troy Noor is the Designated Compliance Person for BOULEVARD and is therefore responsible for maintaining compliance supervision of the firm and all its associates. Troy Noor may be reached directly at (877) 664-2583 ext.601..