



Item 1 - Cover Page

BOULEVARD WEALTH MANAGEMENT, INC.

Form ADV 2B – Amy Nielsen

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](http://www.boulevardwealth.com)

This Brochure provides information about the education, experience and general background of Amy Nielsen, RICP®, related to her 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](http://www.adviserinfo.sec.gov).

Revised December 23, 2020



## Item 2 – Educational Background & Business Experience

### EDUCATION

Bachelor of Applied Science, ITT Technical Institute

### RECENT EXPERIENCE

Pruco Securities LLC; Registered Representative

11 /2017 – 08/2019

The Prudential Insurance Company of America; Financial Professional

11 /2017 – 08/2019

Thrivent Investment Management Inc; Registered Representative

01/2014 - 11/2017

Thrivent Financial; Financial Associate

07/2014 - 11/2017

Thrivent Financial; Associate Representative

05/2014 - 07/2014

### OTHER EXPERIENCE

Grand Hall Studio; Owner

09/2008 - 10/2013



The RICP® designation provides comprehensive instruction on building integrated and comprehensive retirement income plans. A key focus is understanding, choosing, and executing a strategy for generating sustainable income from available resources—whether that means using systematic withdrawals from a portfolio, building an income floor with bonds or annuities, or using a bucket strategy. The program, developed by more than 45 of the nation’s top retirement planning experts, provides students with best practices in areas including:

- Social Security claiming
- Evaluating and addressing risks faced in retirement
- Choosing distributions from employer sponsored plans
- Medicare and other health insurance choices
- Planning for long-term care needs
- Choosing appropriate housing
- Income tax and legacy planning

## Item 3 – Disciplinary Information

None of our advisory representatives has any disciplinary history.

## Item 4 – Other Business Activities

Amy Nielsen is an owner in and practitioner with Lifestyle Advisors, LLC, which is a Medicare insurance and supplemental insurance business. Amy Nielsen is an owner in and practitioner with Nielsen Group, LLC (DBA Lifestyle Advisors), which is a group/individual health insurance and medical cost-sharing business. Lifestyle Advisors, LLC and Nielsen Group, LLC are unrelated to the business of BOULEVARD.

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Amy Nielsen is a Life/Health insurance agent [MN Resident Agent License #40382775], National Insurance Producer Registry (NIPR) #17266585], and as such may receive commissions for the sale of the following lines of insurance: Accident, Health, Life, Annuities, Disability and Long-term Care. General activities Include: Health Insurance and Medical Cost-sharing Planning, General Estate Planning, Trust Funding, Business Succession Planning, and Deferred Compensation Structuring.

#### Item 5 – Additional Compensation

Amy Nielsen is compensated through Boulevard Wealth Management, Inc, a General Life/Health Insurance Agency [MN Resident Agency License # 40555305], for the purpose of conducting insurance business in the following product lines: Life, Disability and Long-term Care. General activities Include: General Estate Planning, Trust Funding, Business Succession Planning, and Deferred Compensation Structuring. Amy Nielsen generally receives a commission allocation for insurance casework undertaken for clients of BOULEVARD. Amy Nielsen is also compensated according to her IAR agreement with BOULEVARD.

As an IAR, Amy Nielsen is also eligible for health insurance benefits (where offered), profit-sharing (where offered), and reimbursement of certain tuition and other industry-related educational expenses necessary for continuing education and professional development. Other business expenses such as meals/entertainment may be approved according to current firm policies for IARs.

#### 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.