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BOULEVARD WEALTH MANAGEMENT, INC.

Form ADV 2B – Derek Villars

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 Derek Villars, CLU[®], CASL[®], ChFC[®], 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 30, 2019



Item 2 – Educational Background & Business Experience

EDUCATION

CHARTERED LIFE UNDERWRITER™ (2003 - 2005)
CHARTERED ADVISOR FOR SENIOR LIVING™ (2013)
CHARTERED FINANCIAL CONSULTANT™ (2014)
Bachelor of Arts, (1991 - 1996) St. Cloud State University

RECENT EXPERIENCE

Risk Management Director, IAR (March 2013 – Present) Boulevard Wealth Management, Inc.

Established BOULEVARD office in Minneapolis to provide closely held business owners and their families with tailored risk management strategies for estate and business succession. Provide portfolio-level Mean Variance Optimization to minimize asset risk.

President (September 2012 – January, 2015) Villars Midwest

Advanced insurance consulting services to business owners, executives, trust officers, accountants, financial planners, estate planners, and attorneys for the benefit of their top tier clients.

Independent Contractor (April 2012 – Present), Onyx Benefit Advisors

Products offered: Life, Disability, Long Term Care, and Annuities

Estate planning services Including: Insurance policy audit / evaluations

Independent Contractor (December 2012 – March 2014) CLA USA

OTHER EXPERIENCE

Sr. Vice President (March 2011 – September 2011), Partners Resource Group

Vice President (July 2007 – September 2012), BlueChip Advisors

Equity Strategist & Retirement Planner (December 2005 – July 2007), Referral

Financial Representative (February 2002 – December 2005), Northwestern

Mutual Regional Manager (1993 - 2002), American Entertainment



Chartered Financial Consultant®

ChFC® (Chartered Financial Consultant®): The ChFC® designation has been a mark of excellence for almost thirty years and currently requires nine college-level courses, the most of any financial planning credential. Average study time to earn the ChFC® exceeds 450 hours. Required courses cover extensive education and application training in financial planning, income taxation, investments, and estate and retirement planning. Additional electives are chosen from such topics as macroeconomics, financial decisions for retirement, and executive compensation. ChFC® designees must meet experience requirements and adhere to continuing education and ethical standards. The credential is awarded by The American College, a non-profit educator founded in 1927 and the highest level of academic accreditation.



Chartered Life Underwriter®

CLU® (Chartered Life Underwriter®): Since 1927, the CLU® has been the respected risk management credential for advisors. Designees have completed eight or more college-level courses representing an average study time of 400 hours. Topics for required courses include insurance and financial planning, life insurance law, estate planning, and planning for business owners and professionals. Elective courses include such advanced topics as income taxes, group benefits, retirement planning, and health insurance. CLU® designees must meet experience and continuing education requirements and must adhere to a high ethical standard. The mark is awarded by The American College, a non-profit educator with the top level of academic accreditation



Chartered Advisor for Senior Living®

CASL® (Chartered Advisor for Senior Living®): The CASL® credential provides advisors with in-depth training on issues impacting seniors and those planning for retirement. The designation incorporates five required, college-level courses that represent an average total study time of more than 250 hours. Topics include investments, estate planning, health and long-term care financing, and financial decisions for retirement. CASL® designees must meet experience, continuing education and ethics requirements. The credential is awarded by The American College, a non-profit educator founded in 1927 and the top level of academic accreditation.

Item 3 – Disciplinary Information

None of our advisory representatives has any disciplinary history.

Item 4 – Other Business Activities

Derek Villars is a Life/Health insurance agent [MN Resident Agent License # 20321758, National Insurance Producer Registry (NIPR) # 7144395], 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.

Item 5 – Additional Compensation

Derek Villars is an employee IAR and is separately compensated through salary and revenue sharing as follows:

Derek Villars is compensated through Boulevard Wealth Management, Inc., acting as a General Life/Health Insurance Agency [MN Resident Agency License # 40232983, National Insurance Producer Registry (NIPR) # 16115993], for the purpose of conducting insurance business in the following product lines: Life Insurance, Disability and Long-term Care. General activities Include: General Estate Planning, Trust Funding, Business Succession Planning, and Deferred Compensation Structuring. Although cases may vary, Derek Villars generally receives a 40% commission allocation for insurance casework undertaken for clients of BOULEVARD.

As an employee IAR, Derek Villars is also eligible for health insurance benefits (where offered), profit-sharing, 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.



As a shareholder of BOULEVARD, Derek Villars may receive certain benefits which include (but are not limited to): bonuses calculated based upon overall revenue growth, 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.. Derek Villars may be reached directly at (877) 664-2583 ext.301.

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..