

*Cover Page*



**JENNIFER ERDMANN LOGAN**

**968 Bradley Street #207  
Watertown, NY 13601**

**Phone: (619) 784-3114**

January 18, 2022

**FORM ADV PART 2  
BROCHURE SUPPLEMENT**

**This brochure supplement provides information about Jennifer Erdmann Logan that supplements the Chisholm Financial Planning & Investments brochure. You should have received a copy of that brochure. Please contact Jennifer Erdmann Logan if you did not receive a Chisholm Financial Planning & Investments' brochure or if you have questions about this supplement. Ms. Logan's CRD number is 5776654.**

**Additional information about Jennifer Erdmann Logan is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

Form ADV, Part 2B, Item 2

***Educational Background and Business Experience***

Jennifer Erdmann Logan  
President and CCO  
Year of Birth: 1983

**Business Background:**

Chisholm Financial Planning & Investments, President and CCO, September 2018 - Present

Woodbury Financial Services, Inc., Registered Representative, December 2016 - Present

Guide My Finances (RUZAM, LLC), Investment Advisor Representative, July 2017-June 2018

Securities America, Inc, Registered Representative, September 2013 – December 2016

Securities America Advisors, Inc., Investment Advisor Representative, September 2013 – December 2016

AXA Advisors, Financial Advisor, April 2010 – September 2013

**Educational Background:**

University of California, Santa Barbara, Major: Political Science/History, Graduated: 2006

California Western School of Law, Juris Doctorate, Graduated: 2009

Form ADV, Part 2B, Item 3

***Disciplinary Information***

Ms. Logan does not have any reportable disciplinary disclosures.

Form ADV, Part 2B, Item 4

***Other Business Activities***

Jennifer Erdmann Logan, owner of Chisholm Financial Planning & Investments, is currently a Registered Representative and Investment Advisor Representative with Woodbury Financial Services, Inc., a broker dealer and registered investment advisor. Jennifer Erdmann Logan is also a licensed insurance agent. From time to time, she will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a

registered investment adviser. Chisholm Financial Planning & Investments always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of Chisholm Financial Planning & Investments in their capacity as an insurance agent or Registered Representative.

During the financial planning process with Chisholm Financial Planning and Investments, the Client may be recommended to utilize the asset management services in Ms. Logan's capacity as Investment Advisor Representative with Woodbury Financial Services. This may present a conflict of interest because Ms. Logan will receive investment advisory fees for asset management through Woodbury Financial Services. Clients are not required to use Ms. Logan or Woodbury Financial Services for asset management services.

In addition, Ms. Logan also provides legal consulting as a sole proprietor. In her capacity as an Investment Advisor Representative, she may render legal advice for compensation if the need arises. This may present a potential conflict of interest because Ms. Logan may recommend she provide legal services because of the compensation received. Chisholm Financial Planning and Investments and its IARs have a fiduciary duty to always act in the best interest of its clients, and not for the benefit of the firm or its IARs. Clients are in no way obligated to utilize Ms. Logan for legal services, and Clients may choose any attorney.

Neither Chisholm Financial Planning & Investments nor its representatives are registered as a Futures Commission Merchant, Commodity Pool Operator, or a Commodity Trading Advisor.

Any and all material conflicts of interest have been disclosed in this Brochure.

Form ADV, Part 2B, Item 5

### ***Additional Compensation***

Jennifer Erdmann Logan does not receive any economic benefit from anyone, who is not a client, for providing advisory services.

Form ADV, Part 2B, Item 6

### ***Supervision***

Chisholm Financial Planning & Investments has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the New York Securities Act. Ms. Logan is Chisholm Financial Planning & Investments' Chief Compliance Officer and the sole Investment Advisory Representative ("IAR") of the firm, therefore she is responsible for all of the activities that occur on behalf of Chisholm Financial Planning & Investments and its clients. She can be reached at (619) 784-3114.

***Requirements for State-Registered Advisers***

In addition to the events listed in Item 3 of Part 2B, if the supervised person has been involved in one of the events listed below, disclose all material facts regarding the event.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:

- (a) an investment or an investment-related business or activity;
- (b) fraud, false statement(s), or omissions;
- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:

- (a) an investment or an investment-related business or activity;
- (b) fraud, false statement(s), or omissions;
- (c) theft, embezzlement, or other wrongful taking of property;
- (d) bribery, forgery, counterfeiting, or extortion; or
- (e) dishonest, unfair, or unethical practices.

Ms. Logan does not have any reportable disciplinary disclosures, nor does she have any reportable disclosures related to the above provided list, nor has she ever been the subject of a bankruptcy petition.