



**LOYD FINANCIAL
MANAGEMENT, INC.**

**Part 2B of Form ADV:
Donald P. Loyd
*Brochure Supplement***

January 2018

7475 E. Peakview Avenue, Building 10

Centennial, CO 80111

P: (303) 779-0987

www.LoydFinancial.com

Don@LoydFinancial.com

Item 1 - Cover Page

This brochure supplement provides information about individual(s) who are registered with Loyd Financial Management, LLC that supplements brochure (Form ADV, Part 2A and/or Appendix 1.) You should have received a copy of Loyd Financial Management's brochure. Please contact Loyd Financial Management, Inc. if you did not receive Loyd Financial Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Donald P. Loyd (CRD #1678089) is available on the SEC's website at www.AdviserInfo.sec.gov.

Please note that the use of the term "registered investment adviser" and description of Loyd Financial Management, Inc. and/or our associates as "registered" does not imply a certain level of skill or training. You are encouraged to review this Brochure and Brochure Supplements for our firm's associates who advise you for more information on the qualifications of our firm and our employees.

Item 2 – Educational Background and Business Experience

BUSINESS STANDARDS & PROFESSIONAL CERTIFICATIONS

Loyd Financial Management, Inc. requires that those involved in determining or giving investment advice must be properly licensed employees who are knowledgeable and experienced in portfolio analysis.

DONALD P. LOYD

Birth Year

Donald P. Loyd was born in May of 1960.

Education

In 1982, Mr. Loyd received a Bachelor of Business Administration Degree (B.B.A) from the University of Miami (Florida). In 1986, he received a Masters of Business Administration Degree (M.B.A.) and a Juris Doctor Degree (J.D.) from the University of Denver. Don was admitted to practice law in the State of Colorado in 1987. He currently maintains his law license but does not actively practice law.

Business Experience

Mr. Loyd has been in the financial services industry since 1987 and in 1991 earned the Certified Financial Planner ("CFP") professional designation from the Certified Financial Planner Board of Standards, Inc. To obtain the designation, the candidate must have a bachelor's degree or higher from an accredited college or university and 3 years of full-time personal financial planning experience. Mr. Loyd has also completed the CFP board registered program and passed the comprehensive CFP Certification Examination. To maintain the designation it is required that 30 hours of continuing education be completed every 2 years including two hours on the Code of Ethics and the Standards of Professional Conduct.

Mr. Loyd maintains membership in the Financial Planners Association as well as the Colorado and Arapahoe Bar Associations.

Item 3 - Disciplinary Information

Mr. Loyd has not been involved in any legal or disciplinary event, including criminal or civil action, administrative or self-regulatory organization proceeding or any other hearing or formal adjudication regarding a professional attainment, designation, or license, that is material to a Client's or prospective Client's evaluation of him.

Item 4 - Other Business Activities

Don was admitted to practice law in the State of Colorado in 1987. He currently maintains his law license but does not actively practice law. Mr. Loyd also holds a Colorado insurance license although he does not actively engage in the purchase or sale of insurance products.

Mr. Loyd is also the owner and manager of Hurricane Holdings, LLC. Hurricane Holdings owns a small office building in Centennial, Colorado. Loyd Financial Management, Inc. is physically located in this building and is a tenant of Hurricane Holdings, LLC.

Item 5 -Additional Compensation

In addition to the compensation mentioned above, Mr. Loyd may receive additional compensation in connection with his attendance at Loring Ward's Annual Educational Conference such as reimbursement for travel, lodging and meal expenses and/or in the form of entertainment, merchandise and other benefits for providing advisory services.

Item 6 - Supervision

Mr. Loyd, CCO, will follow the written policies and procedures that have been adopted by the Firm and is responsible for all supervision and formulation and monitoring of investment advice to clients. He can be reached at (303) 779-0987. Mr. Loyd will review all employee personal securities transactions on a quarterly basis (when applicable), oversee all material investment policy changes, and conduct periodic testing to ensure that client objectives and mandates are being met.

Item 7 - Requirements for State-Registered Advisers

Donald P. Loyd has not been involved in any material events including an award of an arbitration claim alleging damages in excess of \$2,500 or an award or finding of liability in a civil, self-regulatory or administrative proceeding involving:

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

Also he has not been the subject of a bankruptcy petition.



**LOYD FINANCIAL
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**Part 2B of Form ADV:
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*Michael Van Boening***

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Michael@LoydFinancial.com

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Additional information about Michael Van Boening (CRD #6889421) is available on the SEC's website at www.AdviserInfo.sec.gov.

Please note that the use of the term "registered investment adviser" and description of Loyd Financial Management, Inc. and/or our associates as "registered" does not imply a certain level of skill or training. You are encouraged to review this Brochure and Brochure Supplements for our firm's associates who advise you for more information on the qualifications of our firm and our employees.

Item 2 – Educational Background and Business Experience

BUSINESS STANDARDS & PROFESSIONAL CERTIFICATIONS

Loyd Financial Management, Inc. requires that those involved in determining or giving investment advice must be properly licensed employees who are knowledgeable and experienced in portfolio analysis.

MICHAEL R. VAN BOENING

Birth Year

Michael R. Van Boening was born in September of 1965.

Educational Background

Mr. Van Boening received a Bachelor of Business Administration Degree (B.B.A) from the University of Phoenix, Colorado Campus.

Business Experience

Mr. Van Boening has spent the past 20 years, working in a variety of business roles, from owning a retail sporting goods franchise to auditing software clients for license compliance. In his most recent position, prior to joining Loyd Financial Management, Inc., he was a Director of Global Client Engagement for a globally diversified, mid-size independent software support provider.

Mr. Van Boening successfully has passed the Series 65 examination and is a Registered Investment Advisor in the State of Colorado. Mr. Van Boening also maintains membership in the Financial Planners Association.

Item 3 - Disciplinary Information

Mr. Van Boening has not been involved in any legal or disciplinary event, including criminal or civil actions, administrative or self-regulatory organization proceedings or any other hearing or formal adjudication regarding a professional attainment, designation, or license, that is material to a client's or prospective client's evaluation of him.

Item 4 -Other Business Activities

Mr. Van Boening is not associated with any other agencies or investment relationships outside of Loyd Financial Management, Inc.

Item 5 - Additional Compensation

In addition to the compensation mentioned above, Mr. Van Boening may receive additional compensation in connection with his attendance at Loring Ward's Annual Educational Conference such

as reimbursement for travel, lodging and meal expenses and/or in the form of entertainment, merchandise and other benefits for providing advisory services.

Item 6 - Supervision

Each investment adviser representative is assigned to a designated supervisor. The assigned supervisor reviews the investment advice provided to clients and periodically inspects the IAR's files, books and records.

The individual responsible for supervising the investment advisory activity of Michael R. Van Boening is:

Donald P. Loyd
Chief Compliance Officer
Loyd Financial Management, Inc.
Telephone number: (303) 779-0987

Item 7 - Requirements for State-Registered Advisers

Michael R. Van Boening has not been involved in any material events including an award of an arbitration claim alleging damages in excess of \$2,500 or an award or finding of liability in a civil, self-regulatory or administrative proceeding involving:

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

Also, Mr. Van Boening has not been the subject of a bankruptcy petition.