

**Blair Bruce Schadler**

**PEACE OF MIND PLANNING, LLC**

**13231 SE 36<sup>th</sup> Street  
Suite 215  
Bellevue, WA 98006**

**949-485-2598  
blair@pomplanning.net**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

**December 2022**

**This brochure supplement provides information about Blair Bruce Schadler that supplements the Peace of Mind Planning LLC brochure. You should have received a copy of that brochure. Contact us at 949 -485-2598 if you did not receive Peace of Mind Planning LLC's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Blair Bruce Schadler (CRD # 2537773) is available on the U.S. Securities and Exchange Commission's ("SEC") website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2 Educational Background and Business Experience

*Year of Birth:* 1972

*Formal Education After High School:*

Western Michigan University; Bachelor of Business Administration in Finance; 1994

*Business Background:*

- Peace of Mind Planning, LLC; Investment Advisor Representative; President and CCO; 07/2020 – Present
- Strategic Marketing Partners; Representative; 05/2011 – Present
- Schadler Financial, LLC; Insurance Agent; 05/2011 – Present
- Horter Investment Management; Investment Advisor Representative; 04/2014 – 08/2020
- Nations Title Agency; Ops. Manager; 03/1997 – 05/2011

## Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license.

Blair Bruce Schadler has not had any legal or disciplinary events in their past. Nor has Mr. Schadler been subject to any reportable criminal or civil actions, administrative proceedings, self-regulatory organization (SRO) proceedings, revocations, or suspensions. Clients and prospective clients can view the CRD records (registration records) for Blair Bruce Schadler through the SEC's Investment Adviser Public Disclosure (IAPD) website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 4 Other Business Activities

Blair Bruce Schadler is licensed as an independent insurance agent and owner of Schadler Financial, LLC, an insurance agency. Blair Bruce Schadler may make recommendations on insurance products and may also, as an independent insurance agent, sell those recommended insurance products to advisory clients. Advisory clients may purchase recommended insurance products from other insurance agents not affiliated with Peace of Mind Planning LLC.

Blair Bruce Schadler will earn commission-based compensation for selling insurance products, including insurance products he sells to you. Insurance commissions earned are separate and in addition to our advisory fees. This practice presents a conflict of interest because Mr. Schadler has an incentive to recommend insurance products for the purpose of generating commissions rather than solely based on the client's needs. Clients are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with Peace of Mind Planning LLC.

Blair Bruce Schadler also acts a Representative for Strategic Marketing Partners. Strategic Marketing Partners is marketing company that assists advisers with marketing ideas and provides marketing material. Blair Schadler receives compensation for assisting with the recruiting of advisors as well as assisting advisors with the vast assortment of marketing tools, technology support and case work design offered by Strategic Marketing Partners.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on, Mr. Schadler's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other*

*Financial Industry Activities and Affiliations* section(s) of Peace of Mind Planning LLC's firm brochure for additional disclosures on this topic.

Except as otherwise disclosed herein, Mr. Schadler does not receive economic benefits (sales awards and other prizes) from someone who is not a client.

## **Item 6 Supervision**

In the supervision of our supervised persons, advice provided is limited based on the restrictions set by Peace of Mind Planning LLC and by internal decisions as to the types of investments that may be included in client portfolios. Peace of Mind Planning LLC conducts periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

Mr. Schadler is the Chief Compliance Officer of Peace of Mind Planning LLC. As such, Mr. Schadler is responsible for supervisory matters relating to the Peace of Mind Planning LLC.

Please call 949-485-2598 to discuss any matters relating to the advisory services offered by Mr. Schadler.

## **Item 7 Requirements for State-Registered Advisers**

Blair Bruce Schadler has not had any legal or disciplinary events in their past. Clients and prospective clients can view the CRD records (registration records) for Blair Bruce Schadler through the SEC's Investment Adviser Public Disclosure (IAPD) website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Blair Bruce Schadler has not been found liable in an arbitration claim alleging damages in excess of \$2,500.

Blair Bruce Schadler has not been found liable in any civil, self-regulatory organization, or administrative proceedings.

Blair Bruce Schadler filed for Chapter 11 bankruptcy on April 29, 2011 (Case #11-04952). The bankruptcy petition was discharged on September 23, 2011.