

The Planner's Edge LLC

Form ADV Part 2B Brochure Supplement

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This brochure supplement provides information about Jeffrey Ross as a supplement to The Planner's Edge disclosure brochure. You should have received a copy of that brochure. Please contact us at the telephone number or email above if you did not receive The Planner's Edge brochure or if you have any questions about the contents of the supplement. Additional information about Jeffrey Ross is available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience

Jeff was born in 1953. He attended Claremont Men's College where he earned a Bachelor of Arts degree in psychology in 1975. He attended the University of Michigan Law School where he earned his J.D. in Law in 1978.

Jeff is a CFP® (Certified Financial Planner). The CFP designation is issued by the Certified Financial Planner Board of Standards, Inc. A CFP candidate must have a bachelor's degree or higher from an accredited college or university, and 3 years full-time personal financial planning experience. The candidate must complete a CFP-board registered program or hold one of the following: CPA, ChFC, CLU, CFA, Ph.D. in business or economics, Doctor of Business Administration or an Attorney's License. CFP candidates must pass the CFP Certification Examinations. To maintain the designation, he must attend at least 30 hours of continuing education every two years.

Business Experience:

- The Planner's Edge®, 1990 to present, Owner and Registered Investment Advisor Representative
- Securities America, Inc., 1998 to 2011, Registered Representative
- Financial Network Advisory Corp., 1988 to 1998, Investment Advisor Representative

- Financial Network Investment Corp. 1985 to 1998, Registered Representative
- Pacific West Securities, Inc. 1981 to 1985, Registered Representative

Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. Jeff has no legal or disciplinary events related to the financial services industry.

Other Business Activities

Jeff does not engage in any other business activities outside of The Planner's Edge®

Additional Compensation

Jeff does not receive any compensation outside of his role with The Planner's Edge®.

Supervision

We are a small investment advisor and Jeff is the owner and sole advisory representative of the firm. Because of our size, traditional internal control and oversight structures are not viable because a separation of duties among different people is not possible. We maintain records that are intended to demonstrate our compliance with securities laws, rules and our policies.