



An Independent Registered Investment Advisory Firm

Timothy J. Bellars

Consolidated Planning Corporation
d/b/a
Bellars Harris Wealth Management

**4429 Bonney Road, Suite 530
Virginia Beach, VA 23462**

Telephone: (757) 704-4201

**1475 Peachtree St. NE
Suite 750
Atlanta, GA 30309**

**Telephone: 404-879-3000
Facsimile: 404-892-1970**

April 5, 2024

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Timothy J. Bellars (CRD no. 1787215) that supplements the Consolidated Planning Corporation brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive Consolidated Planning Corporation's brochure or if you have any questions about the contents of this supplement.

Additional information about Timothy J. Bellars is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Timothy J. Bellars

Year of Birth: 1965

Formal Education after High School:

- Cornell University, Bachelor of Science, Industrial & Labor Relations, 1987

Business Background for the Previous Five Years:

- Consolidated Planning Corporation, Investment Adviser Representative, 04/2022 - Present
- Raymond James Financial Services, Inc., Financial Advisor, 05/2020 - Present
- Bellars Harris Wealth Management, Owner, 05/2020 - Present
- Raymond James Financial Services Advisors, Inc, Investment Adviser Representative, 05/2020 - 05/2022
- Bank of America, NA, Bank Associate/Financial Advisor, 09/2009 - 05/2020
- Merrill Lynch, Pierce, Fenner & Smith, Inc., Financial Advisor, 04/2005 - 05/2020

Certifications:

None

Mr. Bellars passed the Series 6 (Investment Company Products/Variable Contracts Representative Examination), Series 7 (General Securities Representative Examination), Series 63 (Uniform Securities Agent State Law Examination) and the Series 65 (Uniform Investment Adviser State Law Examination) examinations. He also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

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. Mr. Bellars has no required disclosures under this item.

Item 4 Other Business Activities

Mr. Bellars is a registered representative with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Bellars may recommend securities products offered by RJFS as part of your investment portfolio. If clients purchase these products through Mr. Bellars, he will receive the customary commissions in his separate capacity as a registered representative of RJFS. Additionally, Mr. Bellars could be eligible to receive incentive awards such as RJFS may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Bellars an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Other than what is disclosed above, Mr. Bellars does not actively engage in any other investment-related business or occupation, nor does he have an application pending to register as a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Additionally, he is not actively engaged in any other business or occupation for compensation, nor is he actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of his time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Bellars' receipt of additional compensation as a result of his activities as a registered representative of RJFS.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Consolidated Planning Corporation's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Consolidated Planning Corporation has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. Consolidated Planning Corporation has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, Consolidated Planning Corporation has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Consolidated Planning Corporation, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct 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.

My supervisor is: Michael Hines, President, Founder

Supervisor phone number: 404-879-3000



Claudia P. Bellars, CDFP

Consolidated Planning Corporation
d/b/a
Bellars Harris Wealth Management

**4429 Bonney Road, Suite 530
Virginia Beach, VA 23462**

Telephone: (757) 704-4200

**1475 Peachtree St. NE
Suite 750
Atlanta, GA 30309**

**Telephone: 404-879-3000
Facsimile: 404-892-1970**

April 5, 2024

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Claudia P. Bellars (CRD no. 2210945) that supplements the Consolidated Planning Corporation brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive Consolidated Planning Corporation's brochure or if you have any questions about the contents of this supplement.

Additional information about Claudia P. Bellars is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Claudia P. Bellars, CDFA

Year of Birth: 1960

Formal Education after High School:

- University of South Carolina, Bachelor of Science, Finance, 1982

Business Background for the Previous Five Years:

- Consolidated Planning Corporation, Investment Adviser Representative, 04/2022 - Present
- Raymond James Financial Services, Inc., Financial Advisor, 05/2020 - Present
- Bellars Harris Wealth Management, Support Company / DBA Owner, 05/2020 - Present
- CPB Enterprises, Support Company / DBA Owner, 05/2020 - Present
- Raymond James Financial Services Advisors, Inc, Investment Adviser Representative, 05/2020 - 05/2022
- Bank of America, NA, Financial Advisor, 11/2009 - 05/2020
- Merrill Lynch, Pierce, Fenner & Smith, Inc., Financial Advisor, 06/2008 - 05/2020

Certifications:

Certified Financial Planner (CFP®) (1996)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the *Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement* and agree to be bound by CFP Board's *Code of Ethics and Standards of Conduct ("Code and Standards")*, which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's *Code and Standards*. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the *Code and Standards*.

Certified Divorce Financial Analyst® (CDFA) (2024)

Certified Divorce Financial Analyst® (CDFA), a professional designation granted by the Institute for Divorce Financial Analysts helps couples and can provide in-depth financial analysis and advice to their attorneys achieve equitable divorce settlements using knowledge of tax law, asset distribution, and short- and long-term financial planning.

Individuals must have a bachelor's degree with three years of on-the job experience or, if no bachelor's degree, five years of relevant experience. Experience has been defined as the following:

- Financial planning
- Family law practice, or

Experience in three or more of the following:

- Tax code
- Investment advisory or management
- Real estate, mortgage, and reverse mortgage lending
- Life and disability insurance
- Financial therapist or coach

To retain the CDFA designation, individuals must pay the annual reinstatement fee and complete 30 divorce-related hours every two years.

Ms. Bellars passed the Series 7 (General Securities Representative Examination), Series 63 (Uniform Securities Agent State Law Examination) and the Series 65 (Uniform Investment Adviser State Law Examination) examinations. She also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

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. Ms. Bellars has no required disclosures under this item.

Item 4 Other Business Activities

Ms. Bellars is a registered representative with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Ms. Bellars may recommend securities offered by RJFS as part of your investment portfolio. If clients purchase these products through Ms. Bellars, she will receive the customary commissions in her separate capacity as a registered representative of RJFS. Additionally, Ms. Bellars could be eligible to receive incentive awards such as RJFS may offer. She may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Ms. Bellars an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Other than what is disclosed above, Ms. Bellars does not actively engage in any other investment-related business or occupation, nor does she have an application pending to register as a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Additionally, she is not actively engaged in any other business or occupation for compensation, nor is she actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of her time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Ms. Bellars' receipt of additional compensation as a result of her activities as a registered representative of RJFS.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Consolidated Planning Corporation's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Consolidated Planning Corporation has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. Consolidated Planning Corporation has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, Consolidated Planning Corporation has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Consolidated Planning Corporation, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct 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.

My supervisor is: Michael Hines, President, Founder

Supervisor phone number: 404-879-3000



An Independent Registered Investment Advisory Firm

Brad A. Harris

Consolidated Planning Corporation
d/b/a
Bellars Harris Wealth Management

**4429 Bonney Road, Suite 530
Virginia Beach, VA 23462**

**Telephone: (757) 704-4203
Facsimile: (757) 704-4207**

**1475 Peachtree St. NE
Suite 750
Atlanta, GA 30309**

**Telephone: 404-879-3000
Facsimile: 404-892-1970**

April 5, 2024

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Brad A. Harris (CRD no. 4492677) that supplements the Consolidated Planning Corporation brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive Consolidated Planning Corporation's brochure or if you have any questions about the contents of this supplement.

Additional information about Brad A. Harris is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Brad A. Harris

Year of Birth: 1964

Formal Education after High School:

- University of Virginia, Bachelor of Arts, English, 1989
- Old Dominion University, Master of Business Administration, IT, 2001

Business Background for the Previous Five Years:

- Consolidated Planning Corporation, Investment Adviser Representative, 04/2022 - Present
- Raymond James Financial Services, Inc., Financial Advisor, 05/2020 - Present
- Bellars Harris Wealth Management, Owner, 05/2020 - Present
- BAH Enterprises, Inc., Owner of support company, 05/2020 - Present
- Raymond James Financial Services Advisors, Inc, Investment Adviser Representative, 05/2020 – 05/2022
- Bank of America, NA, Bank Associate/Financial Advisor, 12/2009 - 05/2020
- Merrill Lynch, Pierce, Fenner & Smith, Inc., Financial Advisor, 04/2005 - 05/2020

Certifications:

NONE

Mr. Harris passed the Series 7 (General Securities Representative Examination), Series 9 (General Securities Sales Supervisor - Options Module Examination), Series 10 (General Securities Sales Supervisors - General Module Examination) and the Series 66 (Uniform Combined State Law Examination) examinations. He also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

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. Mr. Harris has no required disclosures under this item.

Item 4 Other Business Activities

Mr. Harris is a registered representative with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Harris may recommend securities products offered by RJFS as part of your investment portfolio. If clients purchase these products through Mr. Harris, he will receive the customary commissions in his separate capacity as a registered representative of RJFS. Additionally, Mr. Harris could be eligible to receive incentive awards such as RJFS may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Harris an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Other than what is disclosed above, Mr. Harris does not actively engage in any other investment-related business or occupation, nor does he have an application pending to register as a broker-dealer,

futures commission merchant (“FCM”), commodity pool operator (“CPO”), commodity trading advisor (“CTA”), or as an associated person of an FCM, CPO, or CTA.

Additionally, he is not actively engaged in any other business or occupation for compensation, nor is he actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of his time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Harris' receipt of additional compensation as a result of his activities as a registered representative of RJFS.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Consolidated Planning Corporation's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Consolidated Planning Corporation has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. Consolidated Planning Corporation has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, Consolidated Planning Corporation has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Consolidated Planning Corporation, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct 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.

My supervisor is: Michael Hines, President, Founder

Supervisor phone number: 404-879-3000



Zachary O. Harris

Consolidated Planning Corporation
d/b/a
Bellars Harris Wealth Management

**4429 Bonney Road, Suite 530
Virginia Beach, VA 23462**

**Telephone: (757) 704-4203
Facsimile: (757) 704-4207**

**1475 Peachtree St. NE
Suite 750
Atlanta, GA 30309**

**Telephone: 404-879-3000
Facsimile: 404-892-1970**

April 5, 2024

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Zachary O. Harris (CRD no. 7384594) that supplements the Consolidated Planning Corporation brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive Consolidated Planning Corporation's brochure or if you have any questions about the contents of this supplement.

Additional information about Zachary O. Harris is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Zachary O. Harris

Year of Birth: 1999

Formal Education after High School:

- College of William & Mary, Bachelor of Arts, Economics, 2021

Business Background for the Previous Five Years:

- Consolidated Planning Corporation, Investment Adviser Representative, 04/2022 - Present
- Raymond James Financial Services Advisors, Inc, Investment Adviser Representative, 04/2022 - 05/2022
- Raymond James Financial Services, Inc., Registered Representative, 05/2021 - Present
- Bellars Harris Wealth Management, Administrative, 05/2021 - Present
- College of William & Mary, Student, 08/2017 - 05/2021
- Atlantic Fire Protection Engineering, Administrative, 06/2017 - 05/2021

Certifications:

NONE

Mr. Harris passed the SIE (Securities Industry Essentials Examination), Series 7 (General Securities Representative Examination), and the Series 66 (Uniform Combined State Law Examination) examinations.

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. Mr. Harris has no required disclosures under this item.

Item 4 Other Business Activities

Mr. Harris is a registered representative with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Harris may recommend securities products offered by RJFS as part of your investment portfolio. If clients purchase these products through Mr. Harris, he will receive the customary commissions in his separate capacity as a registered representative of RJFS. Additionally, Mr. Harris could be eligible to receive incentive awards such as RJFS may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Harris an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Other than what is disclosed above, Mr. Harris does not actively engage in any other investment-related business or occupation, nor does he have an application pending to register as a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Additionally, he is not actively engaged in any other business or occupation for compensation, nor is he actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of his time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Harris' receipt of additional compensation as a result of his activities as a registered representative of RJFS.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Consolidated Planning Corporation's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Consolidated Planning Corporation has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. Consolidated Planning Corporation has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, Consolidated Planning Corporation has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Consolidated Planning Corporation, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct 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.

My supervisor is: Michael Hines, President, Founder

Supervisor phone number: 404-879-3000



Axel J. Bellars

Consolidated Planning Corporation
d/b/a
Bellars Harris Wealth Management

**4429 Bonney Road, Suite 530
Virginia Beach, VA 23462**

Telephone: (757) 704-4204

**1475 Peachtree St. NE
Suite 750
Atlanta, GA 30309**

**Telephone: 404-879-3000
Facsimile: 404-892-1970**

April 5, 2024

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Axel J. Bellars (CRD no. 6882122) that supplements the Consolidated Planning Corporation brochure. You should have received a copy of that brochure. Contact us at (404) 879-3000 if you did not receive Consolidated Planning Corporation's brochure or if you have any questions about the contents of this supplement.

Additional information about Axel J. Bellars is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Axel J. Bellars

Year of Birth: 1996

Formal Education after High School:

- George Mason University, Bachelor of Science, Finance, 2018

Business Background for the Previous Five Years:

- Consolidated Planning Corporation, Investment Adviser Representative, 04/2022 - Present
- Raymond James Financial Services, Inc., Financial Advisor, 05/2020 - Present
- Bellars Harris Wealth Management, Vice President, 05/2020 - Present
- Raymond James Financial Services Advisors, Inc, Investment Adviser Representative, 05/2020 - 05/2022
- Bank of America, NA, Bank Associate/Financial Advisor, 07/2018 - 05/2020
- Merrill Lynch, Pierce, Fenner & Smith, Inc., Financial Advisor, 06/2018 - 05/2020

Certifications:

None

Mr. Bellars passed the Series 7 (General Securities Representative Examination), Series 9 (General Securities Sales Supervisor - Options Module Examination), and the Series 66 (Uniform Combined State Law Examination) examinations. He also received credit for the SIE (Securities Industry Essentials Examination) on October 1, 2018.

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. Mr. Bellars has no required disclosures under this item.

Item 4 Other Business Activities

Mr. Bellars is a registered representative with Raymond James Financial Services, Inc. ("RJFS"). RJFS is a diversified financial services company engaged in the sale of specialized investment products. In this capacity, Mr. Bellars may recommend securities products offered by RJFS as part of your investment portfolio. If clients purchase these products through Mr. Bellars, he will receive the customary commissions in his separate capacity as a registered representative of RJFS. Additionally, Mr. Bellars could be eligible to receive incentive awards such as RJFS may offer. He may also receive 12b-1 fees from mutual funds that pay such fees. The receipt of additional compensation may give Mr. Bellars an incentive to recommend investment products based on the compensation received, rather than on your investment needs.

Other than what is disclosed above, Mr. Bellars does not actively engage in any other investment-related business or occupation, nor does he have an application pending to register as a broker-dealer, futures commission merchant ("FCM"), commodity pool operator ("CPO"), commodity trading advisor ("CTA"), or as an associated person of an FCM, CPO, or CTA.

Additionally, he is not actively engaged in any other business or occupation for compensation, nor is he actively engaged in any other business activity or activities that provides a substantial source of income or involves a substantial amount of his time.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Bellars' receipt of additional compensation as a result of his activities as a registered representative of RJFS.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of Consolidated Planning Corporation's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Consolidated Planning Corporation has adopted, and periodically updates, its compliance manual, which includes a formal Code of Ethics and Insider Trading Policies and Procedures, that outlines for each employee the rules and regulations to which they must adhere. Consolidated Planning Corporation has appointed a Chief Compliance Officer who reviews and monitors employee activity with respect to these rules and regulations. In addition, Consolidated Planning Corporation has adopted a Code of Ethics that requires each employee to always act in the best interest of clients.

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Consolidated Planning Corporation, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct 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.

My supervisor is: Michael Hines, President, Founder

Supervisor phone number: 404-879-3000