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This brochure supplement provides information about Jeanne Smith that supplements the Diversified, LLC brochure. This brochure is meant to supplement the Diversified, LLC firm brochure, a copy of which you should have received. Please contact David Levy, Chief Compliance Officer, if you did not receive the Diversified, LLC brochure or if you have any questions about the contents of this supplement.

Additional information about Jeanne Smith (CRD # 2854633) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 Educational Background and Business Experience**

### **Jeanne Smith, CFP® , RLP®**

Jeanne joined Diversified, LLC in 2022 as an Investment Advisor Representative. Jeanne is the president of Marca, Inc. since 2005, an independent consultant for care management and personal advocacy for individuals. Prior to joining Diversified, LLC, Jeanne was also the owner and Investment Advisor Representative of Marca Life Planning since 2005. Jeanne, born in 1954, is a 1993 graduate of the University of Michigan, where she earned a MS in Nursing. Jeanne holds her Life and Health insurance license, as well as her securities license.

In 2004, Jeanne earned the Certified Financial Planner™ designation (CFP®) from the College for Financial Planning in Denver, Colorado. The CFP® is conferred by the Certified Financial Planner Board of Standards, Inc. after candidates have met all of the requirements for certification. Those requirements include having completed a Board-Registered educational program, having at least three years of qualifying work experience in the personal financial planning area, and passing the CFP® Certification Examination. The exam, which is administered over two days, tests a financial planner's ability to apply his or her knowledge to specific client situations. Individuals who become certified must complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct to maintain the right to continue to use the CFP® marks.

In 2010, Jeanne earned the Registered Life Planner designation (RLP®) from the Kinder Institute of Life Planning. RLP is a designation for financial professionals who specialize in the human side of financial planning to train advisors to harness behavioral and relational aspects of financial planning. A RLP completed a three course training study; The Seven Stages of Money Maturity, EVOKE Life Planning and Life Planning Mentorship. A RLP is required to continue attending at least eight hours of Continuing Education every two years.

## **Item 3 Disciplinary Information**

Registered investment advisors 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. There are no applicable disclosures to report for Jeanne Smith.

## **Item 4 Other Business Activities**

While serving as an Investment Advisor Representative, Diversified, LLC is Jeanne's primary business activity that takes up the vast majority of her business time, Jeanne is also engaged in other business activities. Jeanne is the President of Marca, Inc., an independent consultant for care management and personal advocacy for individuals. Ms. Jeanne's duties as the President of Marca, Inc., do not create a conflict of interest to her provision of advisory services through Diversified, LLC.

Jeanne is also licensed as an insurance agent with various insurance companies. If clients purchase non-variable insurance products from Jeanne, she may receive separate, yet customary compensation in the form of an insurance commission.

While Jeanne always endeavors to put clients' interests first and foremost, clients should be aware that the receipt of additional compensation itself creates a conflict of interest for Jeanne when making insurance recommendations. To address the potential for a conflict of interest, Jeanne makes certain to disclose to clients, any fees or compensation associated with recommended insurance products.

Clients are provided with applicable product offering materials that discuss the fees associated with the applicable product. Clients are also asked to sign applicable disclosure documents and applications that point out important product features and fees.

## **Item 5 Additional Compensation**

As noted in Item 4 above, Jeanne also earns compensation as an insurance agent and through Jeanne's other business activities detailed above. This compensation, as detailed in Item 4, is separate and apart from the compensation earned from Diversified, LLC.

While Jeanne always endeavors to put her clients' interests first and foremost, clients should be aware that the receipt of additional compensation from other business activities creates a conflict of interest when making investment or insurance recommendations. To address the potential for a conflict of interest, Jeanne makes certain to disclose to clients, any fees or compensation associated with recommended investment or insurance products. Clients are provided with applicable product prospectuses and offering materials, which discuss the fees associated with the applicable products. Clients are also asked to sign applicable disclosure documents that point out important product features and fees.

As a fiduciary, Jeanne makes product recommendations that she feels are in client's best interest and are based on the specific needs and objectives of the client, not the compensation potential of the product or other business activities.

## **Item 6 Supervision**

Diversified, LLC has appointed a Chief Compliance Officer who is responsible for the overall supervision of the firm. The Chief Compliance Officer is David Levy. Mr. Levy implements policies and procedures to ensure compliance with industry rules and regulations. He maintains required books and records to monitor the investment advice and recommendations made on behalf of the firm. Diversified, LLC has a specific Code of Ethics that applies to all employees. Mr. Levy implements procedures to ensure employees comply with the firm's Code of Ethics, and he monitors all reports provided pursuant to the Code. Mr. Levy is located in the Diversified, LLC main office in Wilmington, DE, and he can be reached at 302-765-3500.