

Cover Page



TYLER HENDERSON, CFP®

**Monterey Wealth Partners LLC
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Phone: (404) 201-2285

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**FORM ADV PART 2
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Tyler Henderson that supplements the Monterey Wealth brochure. You should have received a copy of that brochure. Please contact Tyler Henderson if you did not receive a copy of the Monterey Wealth's brochure or if you have questions about this supplement. Mr. Henderson's CRD number is 5243395.

Additional information about Tyler Henderson is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience

Tyler Henderson, CFP®
Investment Advisor Representative
Year of Birth: 1984

Educational Background:

The Ohio State University, Bachelor of Science in Finance, Graduated: 2008

Business Experience:

Monterey Wealth, Investment Advisor Representative, December 2022 - Present

Oxford Financial Partners, Investment Advisor Representative, January 2018 – December 2022

MML Investors Services, Inc., Registered Representative, October 2008 – January 2018

Mass Mutual, Agent, October 2008 – January 2018

Relevant Designations:

CERTIFIED FINANCIAL PLANNER™ (CFP®)

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 or higher 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 requirements 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.

Form ADV, Part 2B, Item 3

Disciplinary Information

Mr. Henderson does not have any reportable disciplinary disclosures.

Form ADV, Part 2B, Item 4

Other Business Activities

Tyler Henderson does not have any outside business activities to report.

Form ADV, Part 2B, Item 5

Additional Compensation

Tyler Henderson does not receive an economic benefit for providing advisory services to anyone who is not a client.

Form ADV, Part 2B, Item 6

Supervision

Monterey Wealth has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the U.S. Securities and Exchange Commission. Mr. Henderson is supervised by Monterey Wealth's Chief Compliance Officer, David Duncan. Mr. Duncan can be reached at (404) 201-2285.

Form ADV, Part 2B, Item 7

Requirements for State-Registered Advisers

This section is not applicable as Monterey Wealth is SEC registered and not state registered.