

KELSEY LYNN BOUWMAN MARTIN

FINANCIAL PLAN, INC.

2115 Barkley Blvd #101  
Bellingham, WA 98226  
(360) 714-1234  
[www.financialplaninc.com](http://www.financialplaninc.com)

March 23, 2021

This Brochure Supplement provides information about Kelsey Lynn Bouwman Martin that supplements the Financial Plan, Inc. Firm Brochure (Form ADV Part 2A). You should have received a copy of that Brochure. Please contact David Dick at (360) 714-1234 or [david.dick@FinancialPlanInc.com](mailto:david.dick@FinancialPlanInc.com) if you did not receive copy of Financial Plan, Inc.'s Form ADV Part 2A or if you have any questions about the contents of this Brochure Supplement.

Additional information about Kelsey Lynn Bouwman Martin is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**KELSEY LYNN BOUWMAN MARTIN**

Year of Birth: 1996

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

**EDUCATION**

2019, Bachelor of Business Management, Concentration in Finance, Western Washington University, Bellingham, WA

**BUSINESS BACKGROUND**

03/2020 to Present     Investment Advisor Representative  
Financial Plan, Inc. (Bellingham, WA)

09/2019 to 03/2020   Client Service Associate  
Financial Plan, Inc. (Bellingham, WA)

10/2017 to 09/2019   Universal Banker  
People's Bank (Lynden, WA)

**Item 3 – Disciplinary Information**

Kelsey Lynn Bouwman Martin has never been subject to any legal or disciplinary proceedings which would be considered material (or otherwise) to a Client's evaluation of her or any of the services Financial Plan, Inc. provides.

**Item 4 – Other Business Activities**

None.

**Item 5 – Additional Compensation**

Kelsey Lynn Bouwman Martin does not receive additional compensation or economic benefit from third parties for providing advisory services to clients of Financial Plan, Inc.

**Item 6 – Supervision**

David Dick is responsible for supervising the services and advice provided to clients of Financial Plan, Inc. As Chief Compliance Officer, he develops policies and procedures for adherence to the Investment Advisers' Act. Kelsey Lynn Bouwman Martin works under David Dick's supervision.