

TOR P. BENSON

FINANCIAL PLAN, INC.

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

February 12, 2024

This Brochure Supplement provides information about Tor P. Benson 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 Tor P. Benson (CRD# 7682710) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

TOR P. BENSON  
Year of Birth: 1989

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

### **EDUCATION**

2012, Bachelor of Science—Majors: Biology and Education, Minor: Chemistry, Oregon State University

### **BUSINESS BACKGROUND**

01/2023 to Present                      Investment Advisor Representative  
10/2022 to 01/2023                      Associate  
Financial Plan, Inc. (Bellingham, WA)

06/2019 to 08/2022                      Logistics Manager, Shareholder  
Hekla Trifecta, LLC

01/2019 to 06/2021                      Tax Preparer  
CF James CPA

01/2012 to 06/2019                      Self-Employed Commercial Fisherman/Logistics Manager

## **Item 3 – Disciplinary Information**

Tor P. Benson has never been subject to any legal or disciplinary proceedings which would be considered material (or otherwise) to a Client's evaluation of him or any of the services Financial Plan, Inc. provides.

## **Item 4 – Other Business Activities**

Owns commercial fishing halibut quota which he fishes one week a year for a total of 40 hours or less than 1 hour per week on a yearly average

## **Item 5 – Additional Compensation**

Tor P. Benson 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., and can be reached at (360) 714-1234. As Chief Compliance Officer, he develops policies and procedures for adherence to the Investment Advisers' Act. Tor P. Benson works under David Dick's supervision.