

## Item 1: Cover Page

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# Blom & Howell Financial Planning, Inc.



## Form ADV Part 2B Brochure Supplement for Gary George Blom

August 18, 2023

Address: 3340 Tully Rd., Ste. B4  
Modesto, CA 95350

Phone: (209) 857-5207

Email: [gary@blomandhowell.com](mailto:gary@blomandhowell.com)

Website: <https://www.blomandhowell.com/>

This brochure supplement provides information about Gary George Blom that supplements the Blom & Howell Financial Planning, Inc. brochure. You should have received a copy of that brochure. Please contact Blom & Howell Financial Planning, Inc. if you did not receive Blom & Howell Financial Planning, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Gary George Blom is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 4281554.

## Item 2: Educational Background & Business Experience

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Name:	Gary George Blom
Year of Birth:	1959
Education:	No formal education after high school
Business Background:	<p>Shareholder, President, Secretary, Treasurer, Financial Advisor Blom &amp; Howell Financial Planning, Inc. February 2021 – Present</p> <p>Financial Advisor Blom &amp; Howell Financial Planning, Inc. (D/B/A under SCF Investment Advisors, Inc. &amp; SCF Securities, Inc.) July 2018 – March 2021</p> <p>Investment Adviser Representative SCF Investment Advisors, Inc. July 2018 – March 2021</p> <p>Registered Representative SCF Securities, Inc. July 2018 – March 2021</p> <p>Registered Representative LPL Financial, LLC November 2009 – August 2018</p>

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Gary George Blom. However, in connection with his termination from a prior employer, Mr. Blom has a reported disclosure that may be viewed by accessing his investment adviser representative report via <https://adviserinfo.sec.gov/individual/summary/4281554>.

## Item 4: Other Business Activities

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Gary George Blom is a licensed insurance agent and from time to time will earn an ordinary and customary commission from the sale of an insurance product in such capacity. This creates a conflict of interest, because Gary George Blom has the potential to earn both an insurance commission and advisory fee revenue from a client. Gary George Blom addresses this conflict of interest by fully disclosing his relationship with the applicable insurance provider, and informing clients that they are under no obligation to purchase an insurance product through him.

Gary George Blom earns income through a residential rental property. This is not anticipated to present any conflict of interest and is wholly separate from his activities with Blom & Howell Financial Planning, Inc.

## Item 5: Additional Compensation

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Gary George Blom does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through Blom & Howell Financial Planning, Inc.

## Item 6: Supervision

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Gary George Blom is the Owner and Chief Compliance Officer, and therefore is supervised pursuant to Blom & Howell Financial Planning Inc.'s written policies and procedures and code of ethics. He may be reached at (209) 857-5207.

## Item 1: Cover Page

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# Blom & Howell Financial Planning, Inc.



## Form ADV Part 2B Brochure Supplement for Michael Joseph Howell

August 18, 2023

Address: 3340 Tully Rd., Ste. B4  
Modesto, CA 95350

Phone: (209) 857-5207

Email: [michael@blomandhowell.com](mailto:michael@blomandhowell.com)

Website: <https://www.blomandhowell.com/>

This brochure supplement provides information about Michael Joseph Howell that supplements the Blom & Howell Financial Planning, Inc. brochure. You should have received a copy of that brochure. Please contact Blom & Howell Financial Planning, Inc. if you did not receive Blom & Howell Financial Planning, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Michael Joseph Howell is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 6127551.

## Item 2: Educational Background & Business Experience

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Name: Michael Joseph Howell

Year of Birth: 1987

Education: Master of Business Administration  
Liberty University  
2012

Bachelor of Arts, Business Administration  
Azusa Pacific University  
2009

Business Background: Shareholder  
Blom & Howell Financial Planning, Inc.  
January 2022 – Present

Financial Advisor  
Blom & Howell Financial Planning, Inc.  
February 2021 – Present

Financial Advisor  
Blom & Howell Financial Planning, Inc. (D/B/A under  
SCF Investment Advisors, Inc. & SCF Securities, Inc.)  
July 2018 – March 2021

Investment Adviser Representative  
SCF Investment Advisors, Inc.  
July 2018 – March 2021

Registered Representative  
SCF Securities, Inc.  
July 2018 – March 2021

Registered Representative  
LPL Financial, LLC  
August 2013 – August 2018

Investment Adviser Representative  
LPL Financial, LLC  
October 2013 – August 2018

Professional Designations: Certified Financial Planner ®

The CFP® certification is a financial planning credential awarded by the Certified Financial Planner Board of Standards Inc. In order to earn and maintain the CFP® designation, individuals must meet the initial certification components of (i) education relevant to the professional, competent, and ethical provision of financial planning services, (ii) pass the certification examination, (iii) attain three years of professional experience, (iv) pass a

background check and disclose certain occurrences, (v) complete thirty hours of continuing education every two years, (vi) submit a certification application every two years, and (vii) pay an annual certification fee. Further information about the qualifications and standards required of a CFP may be found by visiting the CFP Board of Standard's website at <http://www.cfp.net/>.

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Michael Joseph Howell.

## Item 4: Other Business Activities

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Michael Joseph Howell is a licensed insurance agent and from time to time will earn an ordinary and customary commission from the sale of an insurance product in such capacity. This creates a conflict of interest, because Michael Joseph Howell has the potential to earn both an insurance commission and advisory fee revenue from a client. Michael Joseph Howell addresses this conflict of interest by fully disclosing his relationship with the applicable insurance provider, and informing clients that they are under no obligation to purchase an insurance product through him.

Michael Joseph Howell serves in various religious, educational, and musical capacities for certain churches. He is also an adjunct professor at SEU NorCal. Neither of these activities are expected to present a conflict of interest as they are wholly separate from his activities with Blom & Howell Financial Planning, Inc.

## Item 5: Additional Compensation

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Michael Joseph Howell does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through Blom & Howell Financial Planning, Inc.

## Item 6: Supervision

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Michael Joseph Howell is supervised and monitored by Gary George Blom, Chief Compliance Officer, pursuant to Blom & Howell Financial Planning, Inc.'s written policies and procedures and code of ethics. Gary George Blom may be reached at (209) 857-5207.

# Blom & Howell Financial Planning, Inc.



## Form ADV Part 2B Brochure Supplement for Kendall Jane Seifert

August 18, 2023

Address: 3340 Tully Rd., Ste. B4  
Modesto, CA 95350

Phone: (209) 857-5207

Email: [kendall@blomandhowell.com](mailto:kendall@blomandhowell.com)

Website: <https://www.blomandhowell.com/>

This brochure supplement provides information about Kendall Jane Seifert that supplements the Blom & Howell Financial Planning, Inc. brochure. You should have received a copy of that brochure. Please contact Blom & Howell Financial Planning, Inc. if you did not receive Blom & Howell Financial Planning, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Kendall Jane Seifert is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and by searching for CRD# 7798540.

## Item 2: Educational Background & Business Experience

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Name:	Kendall Jane Seifert
Year of Birth:	2001
Education:	Business Management Grand Canyon University 2023
Business Background:	Client Service Advisor Blom & Howell Financial Planning, Inc. August 2023 – Present  Crew Member Trader Joes September 2018 – Present

## Item 3: Disciplinary Information

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There are no legal or disciplinary events material to a client's or prospective client's evaluation of Kendall Jane Seifert.

## Item 4: Other Business Activities

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Kendall Jane Seifert has no disclosable outside business activities.

## Item 5: Additional Compensation

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Kendall Jane Seifert does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through Blom & Howell Financial Planning, Inc.

## Item 6: Supervision

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Kendall Jane Seifert is supervised and monitored by Gary George Blom, Chief Compliance Officer, pursuant to Blom & Howell Financial Planning, Inc.'s written policies and procedures and code of ethics. Gary George Blom may be reached at (209) 857-5207.