



*A Registered Investment Adviser*

Part 2B of Form ADV:  
***Brochure Supplement***  
***Bryan L. Weiss, AIF® - CRD # 5124457***

Dated February 27, 2019

For further information about this Brochure Supplement contact:

Bryan L. Weiss, AIF®  
Home Office  
698 Oldefield Commons Dr. Suite 1  
Greenwood, IN 46142  
Phone (317) 888-9465  
<http://www.marianfinancial.com>  
[bryan@marianfinancial.com](mailto:bryan@marianfinancial.com)

*This brochure supplement provides information about Bryan L. Weiss that supplements the Marian Financial Partners, Inc. Form ADV Part 2A brochure. You should have received a copy of that brochure. Please contact Bryan L. Weiss if you did not receive Marian Financial Partners, Inc.'s brochure or if you have any questions about the contents of this brochure supplement.*

*Please note that information about investment adviser representatives is not found at the FINRA Broker Check site, because investment adviser representatives are not registered representatives with a broker-dealer. Information on investment adviser representatives is found instead at the SEC's website located at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

*Registration as an Investment Adviser Representative of a Registered Investment Adviser means that the Investment Adviser Representative has either passed a Series 65 examination, or passed both a Series 7 and Series 66, or has qualified by virtue of having one of the following professional designations: CFP®, ChFC®, PFS®, CFA® or CIC®.*

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# I. Education & Experience Background

- *Name:*
  - Bryan L. Weiss
  - *Born:* 1965
  
- *Education Background:*
  - Vincennes University – AA - 1995
  - Aviation Maintenance
  
- *Business Background:*
  - Marian Financial Partners, Inc. – President – 2010 to Present
  - Frank & Kraft Wealth Coaching, Inc. - Principal and Co-Owner - 2015 to Present
  - Asset Preservation Alliance – President – 1999 – Present
  - Marian Financial Partners, LLC – Principal/Co-Owner – 2009 – 2010
  - Marian Financial Services, Inc. – President – 2006 – 2010
  - United Airlines – Aircraft Engineer – 1995 – 2003

## **AIF® Designation Qualifications and Requirements**

Bryan L. Weiss holds the AIF® designation and obtained it through the Capstone Program described below. AIF stands for Accredited Investment Fiduciary. The Accredited Investment Fiduciary® Designation represents a thorough knowledge of and ability to apply the fiduciary Practices taught through fi360™'s AIF Training program. Through the fi360™'s AIF Training program, AIF designees learn the Practices and the legal and best practice framework they are built upon. AIF designees have a reputation in the industry for the ability to implement a prudent process into their own investment practices as well as being able to assist others in implementing proper policies and procedures.

## **Accredited Investment Fiduciary Training**

Upon successful completion of the program, participants will be able to:

- Articulate the basis for, and benefits of, fiduciary standards of excellence.
- Identify when an individual or organization may be deemed to have fiduciary status.
- Identify the legal standards that require fiduciaries to prudently manage the investment decisions.
- Apply the Practices that define a prudent investment process for Investment Stewards and Advisors and recognize the Practices for Investment Managers.
- Strengthen their own or clients' fiduciary policies and procedures.
- Become an Accredited Investment Fiduciary®

## **Program Formats**

The AIF Training curriculums offered in distance education or a blended learning option to suite each student's needs. Each format culminates in the 60 question AIF examination, which must be passed with a 75% score or better in order to file for the AIF® Designation. After

passing the examination, a student wishing to file for the AIF® Designation must submit the accreditation application and accreditation fee of \$325.

### **Capstone Program of Study**

The AIF Capstone program format combines a day of face-to-face instruction with access to our web-based program of study described below. Students complete coursework online and attend a scheduled, one day training session that offers students and opportunity to discuss course concepts with instructors and fellow students. The examination is proctored for Capstone program students who attend. The price for the Capstone program is \$1,950.00.

### **Web Based Program of Study**

The AIF web-based program is the pure distance education version of the AIF Training curriculum. This format offers great flexibility and minimal out of the office time for students. Students receive access to the program automatically, with a registration package following in the mail. Students have 180 days to complete the AIF web-based program. Students in the web-based AIF Training course, or those who otherwise cannot participate in the classroom examination, will be responsible for providing their own proctor. The price for the web-based program is \$1,450.00.

### **AIF Exam Information**

The AIF final exam must be passed with a score of 75% or better for eligibility to apply for the AIF® Designation. The exam is a 90-minute, closed book exam and students may not use any course materials or notes.

The AIF final exam is a proctored exam. The requirement for a proctor ensures the integrity of the examination process as one of the high standards for earning the AIF® Designation.

### **Requirements to maintain the AIF® Designation**

- Accrue six hours of continuing professional education with a least four hours coming from fi360™ produced sources.
- Attest to a code of ethics.
- Maintain current contact information in the fi360™ designee database - fi360™ – Fiduciary education, data, and solutions for fulfilling fiduciary duty.
- Remit \$325 in annual dues.

## **II. Disciplinary Information**

Bryan L. Weiss has a clean insurance, securities and investment adviser background history and therefore he has no disciplinary information on his record pertaining to any licenses that he has held in the past or currently holds today in Indiana or any other state.

Additional information about Bryan L. Weiss is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **III. Other Business Activities**

Bryan L. Weiss is a Co-Owner of Frank & Kraft Wealth Coaching, Inc. CRD # 175328 which is a registered investment adviser registered in the State of Indiana.

Bryan L. Weiss owns Asset Preservation Alliance, Inc. which is the firm where he conducts his insurance agency activities. Mr. Weiss spends an insignificant amount of time (less than 2%) working for Asset Preservation Alliance, Inc. and a significant amount of time (more than 98%) working for Marian Financial Partners, Inc. and Frank & Kraft Wealth Coaching, Inc.

### **IV. Additional Compensation**

Mr. Weiss does not receive any additional economic benefits other than his normal earnings from investment management and financial planning fees from Marian Financial Partners, Inc. and Frank & Kraft Wealth Coaching, Inc.

Mr. Weiss may receive in the future commissions from the sale of insurance products for which he is licensed. However, Mr. Weiss does not spend a substantial amount of his time (less than 2%) in this area. Any compensation earned by Mr. Weiss from insurance commissions would be fully disclosed in advance and in writing.

### **V. Supervision**

Mr. Weiss is the owner of Marian Financial Partners, Inc. and is self-supervised. Even though Mr. Weiss is self-supervised, he does maintain a relationship with an outside compliance consultant to review his marketing activities. Mr. Weiss submits a request to the outside compliance consultant for approval for his marketing activities.

In regard to Frank & Kraft Wealth Coaching, Inc., Mr. Weiss is supervised by the President and Chief Compliance Officer Paul A. Kraft.

### **VI. Additional Disclosure Requirements for State-Registered Advisers**

Mr. Weiss has a clean insurance, securities and investment adviser background history and therefore he has no disciplinary information on his record pertaining to any licenses and or designations that he has held in the past or currently holds today in Indiana or any other state. Mr. Weiss has never declared bankruptcy.