

ELIZABETH A. BARRY, CFP®

WILLAMETTE FINANCIAL ADVISORS, LLC

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March 14, 2023

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This Brochure Supplement provides information about Elizabeth A. Barry, CFP® with Willamette Financial Advisors, LLC (“WFA”) that supplements the Willamette Financial Advisors, LLC Brochure. You should have received a copy of that Brochure. Please contact James M. Jones, CFP®, at (503) 747-0306 or [jimj@wfinadv.com](mailto:jimj@wfinadv.com) if you did not receive WFA’s Brochure, or if you have any questions about the contents of this Brochure Supplement.

Additional information about Elizabeth A. Barry, CRD # 5631503, is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Elizabeth A. Barry, CFP®

Year of Birth: 1981

#### Education

Bachelor of Science, Oregon State University, 2022

#### Business Background

10/2022 to Present	Investment Advisor Representative
01/2022 to 10/2022	Advisor Associate Willamette Financial Advisors, LLC
09/2017 to Present	Financial Advisor Associate Volco Consulting
03/2022 to 06/2022	Student Oregon State University
02/2016 to 11/2016	Wealth Services Associate McGee Wealth Management
10/2012 to 02/2015	Senior Portfolio Administrator Arnerich Massena, Inc.

#### Professional Designations

**CERTIFIED FINANCIAL PLANNER™, CFP®** and federally registered CFP (with a flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (CFP Board).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with Clients.

Ms. Barry completed the requirements that were in effect at the time of her certification. Currently, to attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined are necessary for the competent and professional delivery of financial planning services, and attain a bachelor’s degree from a regionally

accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;

- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and Client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – (1) Complete at least three years (at least 6,000 hours) of full-time financial planning-related experience or (2) complete at least two years (at least 4,000 hours) of full-time financial planning-related experience while under the supervision of a CFP® professional; and
- Ethics – Agree to be bound by the CFP Board's *Code of Ethics and Standards of Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Code of Ethics and Standards of Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their Clients.
- CFP® professionals who fail to comply with the above standards and requirements may be subject to the CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Item 3 Disciplinary Information**

Ms. Barry has not 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 she provides.

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

Ms. Barry has no other business activities to disclose at this time.

### **Item 5 Additional Compensation**

Ms. Barry does not receive additional compensation or economic benefit from third parties for providing advisory services to clients of Willamette Financial Advisors, LLC.

**Item 6 Supervision**

Dr. Ronald A. Barry and Mr. James M. Jones, Managing Members of Willamette Financial Advisors, LLC, have oversight responsibility for all services and advice provided to Clients of WFA. Mr. Jones and Dr. Barry are also responsible for the overall compliance policies and procedures of the firm.