

Brochure Supplement Form ADV Part 2B

David M. Goar
Doing Business As: Goar Financial Services
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Promontory Financial Planning
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This brochure supplement provides information about David M. Goar that supplements the Promontory Financial Planning brochure. You should have received a copy of that brochure. Please contact Promontory Financial Planning if you did not receive our firm's brochure at 1-801-513-2545 or if you have any questions about the contents of this supplement.

Additional information about David M. Goar is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

David M. Goar, Born 01/77

Education Background:

Brigham Young University, Bachelor of Science, Sociology, 2001

Business Background & Other Business Activities:

Reutemann Financial Solutions.: Investment Advisor Representative, 03/2015 – 3/31/2022

Goar Financial Services LLC: Owner, 06/2018 - Present

Purshe Kaplan Sterling Investments: Registered Representative, 03/2015 - Present

UBS Financial Services: Financial Advisor, 01/2007 to 03/2015

Professional Designations: None

Item 3 Disciplinary Information

David M. Goar has never been subject to a legal or disciplinary event.

Item 4 Other Business Activities

David M. Goar is an Investment Advisor Representative of Promontory Financial Planning LLC. If requested, David may execute securities transactions to implement a financial plan that he has developed in his capacity as an investment advisory representative. Promontory Financial Planning receives fees directly from client accounts. David receives a portion of those fees from Promontory Financial Planning. David M. Goar is also required to comply with Promontory Financial Planning Code of Ethics and Policy and Procedures.

In addition to David M. Goar activities as an investment advisor representative of Promontory Financial Planning, David may engage in the sale of commission-based investments with PKS broker dealer. David may also utilize insurance products that do not fit within the definition of “securities”. As an insurance agent and series 7 licensed, David may sell the following products.

- Mutual Funds with trail commissions
- Life Insurance Products
- Annuity Contracts

Item 5 Additional Compensation

David M. Goar is a representative of Purshe Kaplan Sterling Investments, Inc (“PKS”), member FINRA/SIPC. As such they are able to accept compensation for the sale of securities or other investment products, including distribution or service (“trail”) fees from the sale of mutual funds. Clients should be aware that the practice of accepting commissions for the sale of securities presents a conflict of interest and gives David an incentive to recommend investment products based on the compensation received. Promontory generally addresses commissionable sales conflicts that arise when explaining to clients these sales create an incentive to recommend based on the compensation to be earned and/or when recommending commissionable mutual funds, explaining that “no-load” funds are also available.

Item 6 Supervision

Brock Williamson, whose phone number is (801) 513-2545 is the Promontory Financial Planning Principal responsible for the supervision of David M. Goar activities as an investment advisory representative of Promontory Financial Planning.