

This brochure supplement provides information about James John Hesson that supplements the First Choice Financial Planning LLC brochure. You should have received a copy of that brochure. Please contact James John Hesson if you did not receive First Choice Financial Planning LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about James John Hesson is also available on the SEC's website at www.adviserinfo.sec.gov.

First Choice Financial Planning LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

James John Hesson

Personal CRD Number: 1747255

Investment Adviser Representative

First Choice Financial Planning LLC
333 East Bethany Drive Suite I-120
Allen, TX 75002
(469) 795-9231
jim@dawsonprivatewealth.com

UPDATED: 07/23/2024

Item 2: Educational Background and Business Experience

Name: James John Hesson **Born:** 1955

Educational Background and Professional Designations:

Education:

BS Music Education, Nyack College - 1979

Designations:

CFP® - Certified Financial Planner

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with 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.

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 as 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 – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional 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 in order to maintain the right to continue to use the CFP® marks:

- i. 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 Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- ii. Ethics – Renew an agreement to be bound by the *Standards of Professional 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 CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business Background:

| | |
|-------------------|--|
| 08/2023 - Present | Investment Adviser Representative First Choice Financial Planning LLC |
| 08/2023 - Present | Financial Advisor Raymond James |
| 01/2014 - 08/2023 | Financial Advisor Edward Jones |
| 08/2007 - 11/2013 | IT Director Dallas Morning News |

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client’s or prospective client’s evaluation of this advisory business.

Item 4: Other Business Activities

James John Hesson is an investment advisor representative with another advisory firm, Raymond James Financial Services Advisors and Raymond James Financial Services, Inc. and from time to time, will offer clients advice or products from those activities and clients should be aware that these services pay a commission or other compensation and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment advisor. RJFSA is a SEC-registered investment advisor. James John Hesson is a registered representative of Raymond James Financial Services, Inc., member FINRA/SIPC. FCFP always acts in the best interest of the client, including with respect to the sale of commissionable products to advisory

clients. Clients are in no way required to implement the plan through any representative of FCFP in such individual's capacity as a registered representative.

Item 5: Additional Compensation

James John Hesson receives additional compensation from Raymond James Financial Services Advisors in exchange for providing Raymond James Financial Services Advisors clients' with advisory services.

Item 6: Supervision

As a representative of First Choice Financial Planning LLC, James John Hesson is supervised by Denise Lynne Webre, the firm's Chief Compliance Officer. Denise Lynne Webre is responsible for ensuring that James John Hesson adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Denise Lynne Webre is (469) 795-9231.

Item 7: Requirements For State Registered Advisers

This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.

- A. James John Hesson has NOT been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
 2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
- B. James John Hesson has NOT been the subject of a bankruptcy.