

RONALD A. BARRY, PhD, CFP®

WILLAMETTE FINANCIAL ADVISORS, LLC

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This Brochure Supplement provides information about Ronald A. Barry, PhD, 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 if you did not receive WFA’s Brochure, or if you have any questions about the contents of this Brochure Supplement.

Additional information about Dr. Ronald A. Barry, CRD # 4775322, is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Ronald A. Barry, PhD, CFP®

Year of Birth: 1950

Education

PhD in Microbiology and Immunology, Washington State University, 1983

Master of Science in Microbiology, Washington State University, 1981

Bachelor of Science in Zoology, College of Idaho, 1972

Certificate of Financial Planning, University of Portland, 2010

Business Background

1/2023 to Present	Member – Manager / Chief Executive Officer / Chief Operations Officer / Investment Advisor Representative Willamette Financial Advisors, LLC
10/2014 to 12/2022	Member – Manager / Chief Executive Officer / Chief Operations Officer / Chief Financial Officer / Investment Advisor Representative Willamette Financial Advisors, LLC
1/2015 to 12/2017	Corporate Investment Advisor & Registered Representative Centaurus Financial, Inc.
12/2003 to 12/2014	Investment Advisor Representative Willamette Financial Group, LLC providing Investment Advisory Services through SagePoint Financial, Inc.
1/2009 to 12/2014	Corporate Investment Advisor & Registered Representative SagePoint Financial, Inc.
10/2005 to 1/2009	Registered Representative AIG Financial Advisors, Inc.

Industry Examinations

Dr. Barry has previously taken and passed the following industry examinations:

FINRA Series 6:	Investment Company Products/Variable Contracts Rep. Examination
FINRA Series 7:	General Securities Representative Examination
NASAA Series 63:	Uniform Securities Agent State Law Examination
NASAA Series 66:	Uniform Combined State Law Examination

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.

Dr. Barry completed the requirements that were in effect at the time of his 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

Dr. Barry has not been subject to any legal or disciplinary proceedings which would be considered material (or otherwise) to a Client's evaluation of him or any of the services he provides.

Item 4 Other Business Activities

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

Item 5 Additional Compensation

Dr. 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.