

*This brochure supplement provides information about Timothy R. Guthrie that supplements the Bullseye Investment Management, LLC brochure. You should have received a copy of that brochure. Please contact Timothy R. Guthrie, Managing Member if you did not receive Bullseye Investment Management, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Timothy R. Guthrie is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

# **Bullseye Investment Management, LLC**

## **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**Timothy R. Guthrie**  
Investment Adviser Representative

Bullseye Investment Management, LLC

Mailing address:

P.O. Box 123  
Milford, OH 45150

(513)-774-3325

(937)-377-1234

(606)-939-1196

800-401-3513 efax

[www.bullseyeinv.com](http://www.bullseyeinv.com)

[tim@bullseyeinv.com](mailto:tim@bullseyeinv.com)

Main office address:

431 Ohio Pike  
Suite # 214  
Cincinnati, OH 45255

Ashland KY office:

1505 Carter Ave.  
Suite # 300  
Ashland, KY 41101

UPDATED: 01/24/2019

### **Item 2: Educational Background and Business Experience**

**Name:** Timothy R. Guthrie

**Born:** 1966

## **Education Background and Professional Designations:**

### **Education:**

BS Accounting, University of the Cumberland - 1989  
CFP Study Program, College for Financial Planning - 1994

### **Designations:**

#### **CFP® - Certified Financial Planner**

A Certified Financial Planner (CFP) is required to meet the following initial certification requirements (known as the four "Es"):

- Education
- Examination
- Experience
- Ethics

These four components are briefly described below;

#### **Education**

The first step to CFP® certification is to acquire the knowledge required to deliver professional, competent and ethical financial planning services to clients, as outlined in the major personal financial planning topic areas identified by CFP Board. The CFP Board's coursework component requires the completion of a college-level program of study in personal financial planning. One must also have earned a bachelor's degree (or higher) from an accredited college or university in order to obtain CFP® certification. The CFP Board does not grant equivalencies or exceptions to the bachelor's degree education requirement.

#### **Examination**

After successfully meeting the education coursework requirement, a candidate will be eligible to register for the CFP® Certification Examination. The CFP® Certification Examination assesses your ability to apply your financial planning knowledge, in an integrated format, to financial planning situations. Combined with the education, experience, and ethics requirements, it assures the public that CFPs' have met a level of competency appropriate for professional practice.

#### **Experience**

Because CFP® certification indicates to the public your ability to provide financial planning without supervision, CFP Board requires you to have 6,000 hours of experience. Qualifying experience may be acquired through a variety of activities and professional settings including personal delivery, supervision, direct support, indirect support or teaching.

#### **Ethics**

CFP® professionals agree to adhere to the high standards of ethics and practice outlined in CFP Board's *Standards of Professional Conduct* and to acknowledge CFP Board's right to enforce them through its *Disciplinary Rules and Procedures*. When a candidate has

completed the education, examination and experience components of the CFP® certification process, they will be directed to complete a CFP® Certification Application on which they will be asked to disclose information about their background, including involvement in any criminal, civil, governmental, or self-regulatory agency proceeding or inquiry, bankruptcy, customer complaint, filing, termination/internal reviews conducted by an employer or firm. CFP Board conducts a detailed background check for all candidates, including review of any disclosures made on the CFP® Certification Application. Authorization to use the CFP® marks will not be approved until the background check and any investigation are concluded successfully.

### **Business Background:**

2007 - Present	Managing Member Bullseye Investment Management, LLC
2002 - 2007	President Bullseye Investment Strategies

### **Item 3: Disciplinary Information**

At no time has Tim Guthrie been found liable for any damages or losses by any judicial, regulatory, or arbitration body. Tim Guthrie has participated in a multi-party settlement (acting on the advice of Bullseye Investment Management's liability carrier's attorney) to prevent the costs, time loss and risks of potential litigation or arbitration. A BIM client who was acting as a trustee was sued by a beneficiary of that trust, and BIM choose to end this potential risk when able.

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

None.

### **Item 5: Additional Compensation**

None. Client management fees from Bullseye Investment Management are Tim Guthrie's only source of income. Timothy R. Guthrie does not receive any economic benefit from any person, company, or organization, in exchange for promoting products or transactions through Bullseye Investment Management, LLC.

### **Item 6: Supervision**

As the owner and representative of Bullseye Investment Management, LLC, Timothy R. Guthrie supervises all duties and activities. Timothy R. Guthrie's contact information is on the cover page of this disclosure document.

## Item 7: Requirements For State Registered Advisers

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

A. Timothy R. Guthrie 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. Timothy R. Guthrie has **NOT** been the subject of a bankruptcy petition at any time.