

**Russ N. Harlan, Jr.**

**Harlan Financial LLC**

1595 Wiker Ave  
Lancaster, Pa 17602

Phone: 717-826-1664

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**FORM ADV PART 2B  
SUPPLEMENTAL BROCHURE**

*This brochure supplement provides clients with information about Russ N. Harlan, Jr. that supplements the Harlan Financial LLC disclosure brochure. You should have received a copy of the Harlan Financial disclosure brochure. Please contact Harlan Financial at 717-826-1664 if you did not receive a copy of the Harlan Financial disclosure brochure or if you have any questions about the contents of this brochure supplement. Additional information about Russ N. Harlan, Jr. is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **EDUCATION BACKGROUND AND BUSINESS EXPERIENCE**

Individuals associated with Harlan Financial LLC must meet certain standards set forth by the firm. Generally, Harlan Financial requires associated persons to have a college degree or a minimum four years related experience, to have displayed a high degree of integrity in previous business background, to have high standards of morals and ethics, and to be committed to providing quality investment advice.

**Russ N. Harlan, Jr.** (Born: 1978)

### Education

Susquehanna University, B.S. in Environmental Science (1997-2001)

### Business Experience

President, Adviser Representative, and CCO, Harlan Financial Services (02/2021 to present)  
Investment Adviser Representative, Securus Financial Services, LLC d/b/a Murray Wealth Management (09/2012 to 09/2020)

Wealth Coach, Securus Financial Services, Inc. d/b/a Murray Securus (01/2012 to 09/2020)

Registered Representative, Purshe Kaplan Sterling Investments (10/2012 to 10/2013)

Registered Representative, Triad Advisors, Inc. (10/2009 to 10/2012)

Wealth Coach, Securus Group, Inc. (10/2009 to 12/2011)

Project Scientist, Roux Associates (02/2006 to 07/2009)

Environmental Scientist, Environmental Alliance (06/2002 to 08/2005)

Biologist, ENSR (06/2001 to 06/2002)

### Licenses/Professional Designations

Series 63 - Uniform Securities Agent State Law Examination (2009)

Series 65 – Uniform Investment Adviser Law Examination (2010)

Accredited Investment Fiduciary (AIF®) (2013)

Accredited Retirement Plan Consultant (ARPC) (2016)

About the AIF® designation:

The AIF Designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF Designation, the individual must meet prerequisite criteria based on a combination of education, relevant industry experience, and/or ongoing professional development, complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the Code of Ethics and Conduct Standards. In order to maintain the AIF Designation, the individual must annually attest to the Code of Ethics and Conduct Standards, and accrue and report a minimum of six hours of continuing education. The Designation is administered by the Center for Fiduciary Studies, the standards-setting body of fi360.

About the ARPC designation:

The purpose of the ARPC certification program is to recognize individual proficiency in the retirement plan industry. The ARPC designation is earned by industry professionals who help employers establish and maintain plans that enable employees effectively to save and plan for retirement. To maintain ARPC certification, Mr. Harlan completes a minimum of 10 hours of continuing education credits annually.

## **DISCIPLINARY INFORMATION**

Mr. Harlan has no legal or disciplinary events to report.

**OTHER BUSINESS ACTIVITIES**

Mr. Harlan is licensed to sell insurance products. As such, Mr. Harlan is able to implement product transactions for which he will receive separate yet typical compensation. While Mr. Harlan endeavors at all times to put the interest of Harlan Financial's clients first as part of his fiduciary duty, clients should be aware that the receipt of additional compensation itself creates a conflict of interest, and may affect Mr. Harlan's judgment when making recommendations.

Mr. Harlan is not engaged in any other business or occupation for compensation that provides a substantial source of his income or involves a substantial amount of his time.

**ADDITIONAL COMPENSATION**

Mr. Harlan does not receive any additional compensation for providing advisory services.

**SUPERVISION**

As the sole adviser of Harlan Financial, Mr. Harlan consults with outside counsel for compliance consulting and supervision.

**REQUIREMENTS FOR STATE-REGISTERED ADVISERS**Disciplinary Events

Mr. Harlan has nothing to report.

Bankruptcy

Mr. Harlan has nothing to report.