

Form ADV Part 2B – Brochure Supplement

for

**Micah S. Porter, CFA® CFP®
Chief Executive Officer and Chief Compliance Officer**

Effective: February 26, 2021

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Micah S. Porter (CRD# 47801339) in addition to the information contained in the Minerva Planning Group, Inc. (“MPG” or the “Advisor”, CRD# 127263) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the MPG Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (404) 816-6688.

Additional information about Mr. Porter is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 4780133.

Item 2: Educational Background and Business Experience

Micah S. Porter, CFA® CFP®, born in 1969, is dedicated to advising Clients of MPG as the Chief Executive Officer and Chief Compliance Officer. Mr. Porter earned a Masters in International Business from University of South Carolina in 1993. Mr. Porter also earned a Bachelor of Arts and Bachelor of Science Interdisciplinary Studies from University of South Carolina in 1991. Additional information regarding Mr. Porter's employment history is included below.

Chief Executive Officer and Chief Compliance Officer, Minerva Planning Group, Inc.	06/2003 to Present
Regional Sales Director; XO Communications	12/1997 to 05/2003

Chartered Financial Analyst™ (“CFA®”)

The Chartered Financial Analyst™ (“CFA®”) charter is a professional designation established in 1962 and awarded by CFA® Institute. To earn the CFA® charter, candidates must pass three sequential, six-hour examinations over two to four years. The three levels of the CFA® Program test a wide range of investment topics, including ethical and professional standards, fixed-income analysis, alternative and derivative investments, and portfolio management and wealth planning. Also, CFA® charter holders must have at least four years of acceptable professional experience in the investment decision-making process and must commit to abide by, and annually reaffirm their adherence to the CFA® Institute Code of Ethics and Standards of Professional Conduct. CFA® is a trademark owned by CFA® Institute.

Certified Financial Planner™ (“CFP®”)

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. Currently, more than 71,000 individuals have obtained CFP® certification in the United States.

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:

- *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
- *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®.

Item 3: Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Mr. Porter. Mr. Porter has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Porter.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. ***As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Porter.***

However, the Advisor does encourage you to independently view the background of Mr. Porter on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 4780133.

Item 4: Other Business Activities

Mr. Porter is dedicated to the investment advisory activities of MPG's Clients. Mr. Porter does not have any other business activities.

Item 5: Additional Compensation

Mr. Porter is dedicated to the investment advisory activities of MPG's Clients. Mr. Porter does not receive any additional forms of compensation.

Item 6: Supervision

Mr. Porter serves as the Chief Executive Officer and Chief Compliance Officer of MPG. Mr. Porter can be reached at (404) 816-6688.

MPG has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of MPG. Furthermore, MPG is subject to regulatory oversight by various agencies. These agencies require registration by MPG and its Supervised Persons. As a registered entity, MPG is subject to examinations by regulators, which may be announced or unannounced. MPG is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

Form ADV Part 2B – Brochure Supplement

for

**Amy Mawson
Client Service Associate**

Effective: February 26, 2021

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Amy Mawson (CRD# 7136326) in addition to the information contained in the Minerva Planning Group, Inc. (“MPG” or the “Advisor”, CRD# 127263) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the MPG Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (404) 816-6688.

Additional information about Ms. Mawson is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with her full name or her Individual CRD# 7136326.

Minerva Planning Group, Inc.

315 W. Ponce de Leon Ave, Suite 915, Decatur, GA 30030

Phone: (404) 816-6688 * Fax: (419) 821-2646

www.minervaplanninggroup.com

Item 2 – Educational Background and Business Experience

Amy Mawson, born in 1982, is dedicated to advising Clients of MPG as a Client Service Associate. Ms. Mawson earned an MSc Globalisation and Development from University of Manchester, Institute for Development Policy and Management in 2005. Ms. Mawson also earned a BA Economic and Social Studies from University of Manchester in 2004. Additional information regarding Ms. Mawson's employment history is included below.

Employment History:

Client Service Associate, Minerva Planning Group, Inc.	08/2017 to Present
Homemaker	01/2011 to 08/2017
Associate Director, Princeton University, Innovations for Successful Societies	07/2010 to 12/2010
Research Specialist, Princeton University, Innovations for Successful Societies	10/2009 to 06/2010
Fellow, Overseas Development Institute	09/2007 to 06/2009

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Ms. Mawson. Ms. Mawson has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Ms. Mawson.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. **As previously noted, there are no legal, civil or disciplinary events to disclose regarding Ms. Mawson.**

However, the Advisor does encourage you to independently view the background of Ms. Mawson on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with her full name or her Individual CRD# 7136326.

Item 4 – Other Business Activities

Ms. Mawson is dedicated to the investment advisory activities of MPG's Clients. Ms. Mawson does not have any other business activities.

Item 5 – Additional Compensation

Ms. Mawson is dedicated to the investment advisory activities of MPG's Clients. Ms. Mawson does not receive any additional forms of compensation.

Item 6 – Supervision

Ms. Mawson serves as a Client Service Associate of MPG and is supervised by Micah Porter, the Chief Compliance Officer. Mr. Porter can be reached at (404) 816-6688.

MPG has implemented a Code of Ethics, an internal compliance document that guides each Supervised Person in meeting their fiduciary obligations to Clients of MPG. Furthermore, MPG is subject to regulatory oversight by various agencies. These agencies require registration by MPG and its Supervised Persons. As a registered entity, MPG is subject to examinations by regulators, which may be announced or unannounced. MPG is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.

Privacy Policy

Effective: February 26, 2021

Our Commitment to You

Minerva Planning Group, Inc. ("MPG" or the "Advisor") is committed to safeguarding the use of personal information of our Clients (also referred to as "you" and "your") that we obtain as your Investment Advisor, as described here in our Privacy Policy ("Policy").

Our relationship with you is our most important asset. We understand that you have entrusted us with your private information, and we do everything that we can to maintain that trust. MPG (also referred to as "we", "our" and "us") protects the security and confidentiality of the personal information we have and implements controls to ensure that such information is used for proper business purposes in connection with the management or servicing of our relationship with you.

MPG does not sell your non-public, personal information to anyone. Nor do we provide such information to others except for discrete and reasonable business purposes in connection with the servicing and management of our relationship with you, as discussed below.

Details of our approach to privacy and how your personal, non-public information is collected and used are set forth in this Policy.

Why you need to know?

Registered Investment Advisors ("RIAs") must share some of your personal information in the course of servicing your account. Federal and State laws give you the right to limit some of this sharing and require RIAs to disclose how we collect, share, and protect your personal information.

What information do we collect from you?

Driver's license number	Date of birth
Social security or taxpayer identification number	Assets and liabilities
Name, address and phone number[s]	Income and expenses
E-mail address[es]	Investment activity
Account information (including other institutions)	Investment experience and goals

What Information do we collect from other sources?

Custody, brokerage and advisory agreements	Account applications and forms
Other advisory agreements and legal documents	Investment questionnaires and suitability documents
Transactional information with us or others	Other information needed to service account

How do we protect your information?

To safeguard your personal information from unauthorized access and use we maintain physical, procedural and electronic security measures. These include such safeguards as secure passwords, encrypted file storage and a secure office environment. Our technology vendors provide security and access control over personal information and have policies over the transmission of data. Our associates are trained on their responsibilities to protect Client's personal information.

We require third parties that assist in providing our services to you to protect the personal information they receive from us.

How do we share your information?

An RIA shares Client personal information to effectively implement its services. In the section below, we list some reasons we may share your personal information.

Basis For Sharing	Do we share?	Can you limit?
<p>Servicing our Clients We may share non-public, personal information with non-affiliated third parties (such as administrators, brokers, custodians, regulators, credit agencies, other financial institutions) as necessary for us to provide agreed upon services to you, consistent with applicable law, including but not limited to: processing transactions; general account maintenance; responding to regulators or legal investigations; and credit reporting.</p>	Yes	No
<p>Marketing Purposes MPG does not disclose, and does not intend to disclose, personal information with non-affiliated third parties to offer you services. Certain laws may give us the right to share your personal information with financial institutions where you are a customer and where MPG or the client has a formal agreement with the financial institution. We will only share information for purposes of servicing your accounts, not for marketing purposes.</p>	No	Not Shared
<p>Authorized Users Your non-public, personal information may be disclosed to you and persons that we believe to be your authorized agent[s] or representative[s].</p>	Yes	Yes
<p>Information About Former Clients MPG does not disclose, and does not intend to disclose, non-public personal, information to non-affiliated third parties with respect to persons who are no longer our Clients.</p>	No	Not Shared

Changes to our Privacy Policy

We will send you a copy of this Policy annually for as long as you maintain an ongoing relationship with us.

Periodically, we may revise this Policy and will provide you with a revised Policy if the changes materially alter the previous Privacy Policy. We will not, however, revise our Privacy Policy to permit the sharing of non-public, personal information other than as described in this notice unless we first notify you and provide you with an opportunity to prevent the information sharing.

Any Questions?

You may ask questions or voice any concerns, as well as obtain a copy of our current Privacy Policy by contacting us at (404) 816-6688.