

# **SHELLEY LEE BOYCE, CFP®, AIF®, CPWA®**

2784 Gateway Road, Suite 102, Carlsbad, CA 92009 | (760) 929-1180 | [Slboyce@financialdesign.net](mailto:Slboyce@financialdesign.net) | [www.FinancialDesign.net](http://www.FinancialDesign.net)

*With over thirty-five years of experience in the insurance and investment advisory industries managing individual and small business assets, Shelley is looking to apply her extensive knowledge towards litigation support to evaluate possible insurance malfeasance and/or product suitability through insurance and securities portfolio analysis.*

## **EDUCATION**

*In addition to the specified academic accomplishments listed below, Shelley must undergo rigorous continuing education each year for her various designations and licenses, effectively maintaining the most up-to-date knowledge in her field of expertise.*

College for Financial Planning®, Denver, CO	
<b>Certified Financial Planners Professional Education Program Certificate</b>	1993
Center for Fiduciary Studies in association with the Center for Executive Education, Joseph M. Katz Graduate School of Business, University of Pittsburgh, Pittsburgh, PA	
<b>Accredited Investment Fiduciary® Designation</b>	2006
Investments & Wealth Institute® with The University of Chicago Booth School of Business Executive Education, Chicago, IL	
<b>Certified Private Wealth Analyst™ Certification</b>	2024
Fiduciary College in association with the Program in Law, Economics and Business, Stanford Law School, Stanford University, Palo Alto, CA	
<b>Certificate of Course Completion</b>	2009

## **RELATED EXPERIENCE**

*Shelley has over three decades experience writing comprehensive, custom financial plans used to assist her diverse clientele in achieving financial security.*

Financial Planning Solutions, Inc.®, a Registered Investment Advisory Firm	
<b>Founder &amp; CEO</b>	1988 – Present

## **CERTIFICATES**

CERTIFIED FINANCIAL PLANNER® Certification	1993
Accredited Investment Fiduciary® Designation	2006
Certified Private Wealth Analyst™ Certification	2024

## **REGISTRATIONS**

FINRA Registrations	
<i>Shelley Lee Boyce CRD Number: 1909900</i>	
<i>Registered States: AZ, CA, FL, IA, ID, IN, MN, NM, NV, OR, PA, UT</i>	
California Department of Financial Protection & Innovation	
<i>Financial Planning Solutions, Inc. CRD Number: 134760</i>	1995

## **LICENSES**

Series S-6 (IR)	1989
Series S-63	1992
Series S-7 (GS)	1995

## **INSURANCE**

Insurance Producer:	
State of California, Department of Insurance	
License Number: 0761225 – Expires 12-31-2026	1988
Non-Resident Insurance Producer:	
Licensed in states: AZ, FL, ID, ME, MN, NM, NV, OR, TX, WA	

## **MEMBERSHIPS**

Financial Planning Association	2000
Investments & Wealth Institute®	2022

## **AWARDS**

FIVE STAR Wealth Manager, San Diego, CA	2012-2015, 2017-2026
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**2012-2015 and 2017-2026 Five Star Wealth Manager Award**, created by Five Star Professional. The 2026 award was presented in December 2025 based on data gathered within 12 months preceding the issue date. 2263 advisors were considered, 187 advisors were recognized. Advisors pay a fee to hold out marketing materials. Not indicative of advisor's future performance. Your experience may vary. For more information, please visit [www.fivestarprofessional.com](http://www.fivestarprofessional.com).

*Shelley Lee Boyce has obtained securities registrations and is a Registered Representative and Investment Adviser Representative with/and offers securities and advisory services through Commonwealth Financial Network®, Member FINRA/SIPC, a Registered Investment Adviser. Financial planning services offered through Financial Planning Solutions, Inc.®, a Registered Investment Adviser, and fixed insurance products and services are separate and unrelated to Commonwealth. CA Insurance License #0761225. Dates for all certification, licenses, or memberships are given for the year first issued or inducted. All licenses, certifications, and memberships are current and in good standing.*