

Derek Jefferson Moffatt
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Strategic Financial Concepts, LLC
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This Brochure Supplement provides information about Derek Jefferson Moffatt that supplements Strategic Financial Concepts, LLC's Brochure. You should have received a copy of that Brochure. Please contact Kristen Wagner if you did not receive Strategic Financial Concepts, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Derek Moffatt is available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience

Derek Jefferson Moffatt

Year of Birth: 1973

Formal Education after High School:

Angelo State University, San Angelo, TX – B.A. in Communications, 1995

Business Background:

Strategic Financial Concepts, LLC, Investment Advisor Representative, 02/2019 to Present

LPL Financial, Registered Representative, 04/2009 to 04/2020

FWPAM, LLC, Investment Advisor Representative, 06/2013 to 01/2019

Professional Designations:

1. CERTIFIED FINANCIAL PLANNER™ (CFP®) – 2019 - Certified Financial Planner Board of Standards, Inc.

Experience Required:

- A bachelor's degree (or higher) from an accredited college or university, and
- 3 years of full-time personal financial planning experience

Educational Requirements:

- Must complete a CFP®-board registered program or hold another designation authorized by the CFPBS.
- 30 hours of continuing education must be completed every two years.

2. CERTIFIED EXIT PLANNER (CEXP) - 2021 – BUSINESS ENTERPRISE INSTITUTE, INC. (BEI)

Experience Required:

- Hold valid professional designation including CPA, JD, CFP, CLU, CFA, MBA or other BEI-approved designation
- Introductory two-day training program

Educational Requirements:

- 100 - 120 hours of online content and self-paced study;
- 10 online course exams
- 2 written exams
- 30 hours every 2 years

Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Other Business Activities

Mr. Moffatt is separately licensed as an insurance agent and is involved in the sale of insurance products. As such, Mr. Moffatt can effect transactions in insurance products for clients and earn commissions for these activities.

Mr. Moffatt may make differing recommendations with respect to the same insurance products to different advisory clients. All recommendations made are specific to each client's individualized needs and current financial situation.

Additional Compensation

As part of their fiduciary duty, Strategic Financial Concepts, LLC ("SFC") and Mr. Moffatt endeavor at all times to put the interest of the client first, clients should be aware that receipt of additional compensation itself creates a potential conflict of interest.

Supervision

SFC is a limited liability company. Reagan Lee Wagner is responsible for reviewing all client accounts and transactions against the signed agreement and the New Account Form for the firm, Strategic Financial Concepts, LLC. For any questions, you may contact Reagan Wagner at (210) 737-7800.