Capital Planning Group, LLC

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Registered Investment Advisor #118921

Form ADV, Part 2B Brochure Supplement

for

Brian S. Seaman, CFP®

December 1, 2023

This brochure supplement provides information about Brian S. Seaman that supplements the Capital Planning Group, LLC Brochure. You should have received a copy of that Brochure. Please contact us at 714-881-1595 and/or Brian@CapitalPlanningGroupLLC.com if you did not receive Capital Planning Group's brochure or if you have any questions about the contents of this supplement.

Additional information about Capital Planning Group also is available on the SEC's website at www.adviserinfo.sec.gov. References herein to Capital Planning Group as a "registered investment adviser" or any reference to being "registered" does not imply a certain level of skill or training.

Item 2 -- Education and Business Background

Education:
Brian S. Seaman, born 1950, attended Calvin College in Grand Rapids, Michigan where he obtained a Bachelor of Arts degree in 1974. In 1981, he graduated from Pepperdine University in Malibu, California where he received a Master of Arts degree in Human Resources Management. He obtained his CFP® designation from the College for Financial Planning in 1991. He obtained the Life Underwriting Training Council Fellow (LUTCF) designation from the American College in 1991. In 2001, he obtained the Chartered Financial Consultant (ChFC) designation from the American College. In 2005, he received his Certified Funds Specialist ("CFS") Advisor designation from the Institute of Business and Finance. In 2010, Mr. Seaman received the Accredited Investment Fiduciary® (AIF®) designation from the Center for Fiduciary Studies, LLC.

Mr. Seaman holds the following Designations:
CFP®, ChFC, LUTCF, CFS, AiF® The CFP® required 2 years of classroom study covering 6 in-depth areas of study, an 8 hour written exam proctored by the College for Financial Planning and ongoing annual continuing education courses as well as 3 years' experience in the financial service industry. For more information regarding the CFP® designation and its requirements please see *Item 4, Advisory Business* in Part 2A of the ADV Brochure accompanying this supplement. The ChFC required 6 months study with the American College, a written final exam proctored by the American College and ongoing annual continuing education. The LUTCF required 8 months on weekly classroom study with 3 proctored final exams by the American College. The CFS and Aif® required a minimum of 3 to 6 months study with written final exams proctored by an independent exam center with ongoing annual continuing education requirements.

Business Background:
Mr. Seaman has extensive experience in the insurance and securities industries. From September 1980 to June 1988, he was a Management Consultant for Pacific Life Insurance Company. From June 1988 to May 1993, he was a Registered Representative for Mutual Service Corporation. From June 1988 to January 1995, he was a life insurance agent for Pacific Life Insurance Company. From April 1994 to January 1995, he was a Principal for Seaport Financial and held the same position for Wealth Management Group from January 1995 to December 1998. From May 1993 to March 2006, he served as a branch Registered Principal for United Planners' Financial Services of America. From March 2006 to December 2008 he was a Registered Principal for NEXT Financial Group, Inc. Since January 2009 he has been a Registered Principal for United Planners' Financial Services of America. He has been a principal of Capital Planning Group since 1999. Mr. Seaman has been a principal of Navigator Legacy Partners LLC since 2005.

Item 3 – Disciplinary Information

Brian Seaman has not been involved in any criminal or civil action or in any proceeding before the SEC, federal or state regulatory body or other self-regulatory organization.

Item 4 – Other Business Activities

Brian S. Seaman became principal of Capital Planning Group in January 1999. He manages investments in brokerage accounts of clients who are primarily individuals, qualified plans (such as pension, 401(k), defined contribution, etc.), trusts, estates and charitable organizations, corporations and other business entities. He also provides comprehensive financial planning services and advice on specific investment and insurance-related projects. Mr. Seaman is also a registered representative of United Planners' Financial Services of America ("UPFSA"), a registered broker/dealer and registered investment advisor. Capital Planning Group is not an affiliate of UPFSA. Mr. Seaman may in his individual capacity recommend that clients purchase products or services that are sold through UPFSA. This presents a conflict of interest because he may have an incentive to recommend UPFSA for executing securities transactions or securities for which he may receive compensation. Clients are under no obligation to act upon any recommendations of Mr. Seaman or effect any transactions through him if they decide to follow his recommendations. As a registered representative of UPFSA, he may receive compensation for effecting certain securities transactions. However, Capital Planning clients will not pay any commissions or other fees on assets in which Capital Planning already receives advisory fees.

United Planners is structured as a Limited Partnership. Individuals who are registered with United Planners that meet certain criteria may qualify to be a limited partner and share in the firm's profits. Brian Seaman has qualified as a limited partner of United Planners and therefore may share in annual profits. This is an investment, not an ownership position. In addition, Mr. Seaman is allowed a voting right, however he has no control over the day to day management of United Planners.

Mr. Seaman is also a licensed insurance agent and can sell insurance and earn sales commissions based on the insurance products he sells through various insurance companies. As a licensed insurance agent, Brian Seaman sells insurance both through his personal license as well as the corporate license. Brian Seaman devotes approximately 20% of his time to insurance and securities sales. Another 70% is devoted to investment advisory and financial planning services. Brian may devote up to 10% of his time to non-financial industry related activities.

Item 5 – Additional Compensation

Brian Seaman's primary compensation comes from his regular salary and ownership of Capital Planning Group, LLC. He may also receive compensation for the activities listed in *Item 4 – Outside Business Activities* of the Brochure.

Item 6 – Supervision

Brian Seaman is the Principal of Capital Planning Group and is not supervised by any other individual. Mr. Seaman may be reached by phone at 714-881-1595.

Item 7 – Requirements for State-Registered Advisers

Brian Seaman has no additional disclosures.