

Part 2B of Form ADV: Brochure Supplement

Robert Michael Florian
1825 Maple Road Suite 240
Williamsville, NY 14221
716-810-9590

Florian Financial Group LLC
Williamsville, New York 14221

03/27/2023

This brochure supplement provides information about Robert M. Florian that supplements the Florian Financial Group LLC brochure. You should have received a copy of that brochure. Please contact Robert M. Florian if you did not receive Florian Financial Group LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Robert M. Florian is available on the SEC's website at www.adviserinfo.sec.gov

Item 2 Educational, Background and Business Experience

Full Legal Name: Robert Michael Florian

Born: 1963

Education

- University of New York at Buffalo; Bachelor of Science in Business Administration, Major: Accounting, Minor: Finance; 1985

Business Experience

- Florian Financial Group LLC; Member; from 03/2004 to Present
- Financial Planning Solutions; Owner; from 05/1997 to 03/2004
- John Hancock Financial Services, Inc./Signator Investors; Agent/Registered Representative; from 11/1990 to 09/2002
- Bristol-Myers Squibb/Westwood Pharmaceuticals; International Auditor/Cost and Inventory Accountant; from 10/1984 to 11/1990

Designations

Robert M. Florian has earned the following designations and is in good standing with the granting authority:

Certified Public Accountant (CPA)

This license is issued by the Education Department of The University of the State of New York after a candidate successfully completes education, examination and experience requirements. Those with the CPA license have completed studies in accounting principles, United States federal taxation, professional auditing, business law, finance, business statistics and economic principles. A licensed CPA is required to take Continuing Professional Education courses and abide by the AICPA Code of Professional Conduct.

Certified Financial Planner® (CFP®)

The CFP® program is administered by the Certified Financial Planner Board of Standards Inc. Those with the CFP® designation have demonstrated competency in all areas of finance related to financial planning. Candidates complete studies on over 100 topics, including stocks, bonds, taxes, insurance, retirement planning and estate planning. In addition to passing the CFP® certification exam, candidates must also complete qualifying work experience and agree to adhere to the CFP® Board's code of ethics and professional responsibility and financial planning standards.

Chartered Life Underwriter® (CLU®)

The CLU® program is administered by the American College, Bryn Mawr, Pennsylvania. Those with the CLU® designation have demonstrated competency in the areas of insurance needs for individuals and business owners and have completed 5 required and 3 elective courses. Courses cover fundamentals of insurance planning, life insurance law, fundamentals of estate planning and planning for retirement needs. In addition to successful completion of an exam in each course of study, candidates are required to have a minimum of three (3) years of business experience.

- CPA; The University of the State of New York Education Department; 1991
- CFP®; Certified Financial Planner Board of Standards Inc.; 1995
- CLU®; The American College; 1997

Item 3 Disciplinary Information

Robert M. Florian has no reportable disciplinary history.

Item 4 Other Business Activities

A. Investment-Related Activities

1. Robert M. Florian is not engaged in any other investment-related activities.
2. Robert M. Florian does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

B. Non Investment-Related Activities

1. Robert M. Florian is a partner in Well Fit Plus, LLC, a workplace wellness app and owns rental property in Western New York.

Item 5 Additional Compensation

Robert M. Florian does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6 Supervision

As the owner of Florian Financial Group LLC, Robert M. Florian is responsible for all supervision and general business strategy of the firm. He is also solely responsible for the formulation and monitoring of investment advice offered to clients, documentation of investment research, implementation of all material investment policy changes, and conducting periodic testing to ensure client objectives and mandates are met. His personal security transactions are collected on a quarterly basis and are available for regulatory review.

Robert M. Florian can be reached at 716-810-9590.