

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
November 2021**



**Glen Alan Thiessen  
(CRD #1244732)**

**Transition Planning, Inc.  
22221 NE 11<sup>th</sup> Place  
Sammamish, WA 98074-6887**

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Joseph Gates  
Chief Compliance Officer**

**Firm Website Address:  
[www.transitionplanninginc.com](http://www.transitionplanninginc.com)**

This brochure supplement provides information about Mr. Thiessen that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Gates if you did not receive Clear Creek Financial Management dba Transition Planning, Inc.'s brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Thiessen is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2: Educational Background & Business Experience

### **Glen Thiessen**

**Year of Birth:** 1959

#### **Educational Background:**

- 1989: The American College

#### **Business Background:**

- 10/2021 – Present Clear Creek Financial Management, LLC dba Harris Financial Advisors; Investment Advisor Representative

#### **Exams, Licenses & Other Professional Designations:**

- 2005: CASL®
- 2004: CFP®
- 1999: RHU®
- 1996: CLU®
- 1995: ChFC®
- 1993: Series 7 & Series 66 Exam
- 1987: Series 63 Exam
- 1984: Series 6 & Series 22 Exam

#### **Chartered Advisor for Senior Living (CASL®)**

The CASL® designation is offered by The American College of Financial Services. Upon completion of this designation, candidates should be able to: (1) Demonstrate an understanding of the psychological, biological and sociological factors facing older clients in order to more effectively meet their unique needs; (2) Aid clients in making decisions about investment and estate planning; (3) Identify and analyze health and long term care financing alternatives for seniors; and (4) Assist clients in making the decisions they face at retirement, including when to claim Social Security, how to take pension distributions, choosing annuities, and deciding between residential options.

Earning the CASL® designation requires professionals to complete 300-400 hours of intensive study and pass a series of five rigorous examinations. Before receiving the CASL® designation, advisors are required to have worked with senior clients for a minimum of 3 years within the 5 years preceding the award of the designation. 15 hours of continuing education are required every 2 years in order to maintain this designation.

#### **Chartered Financial Consultant® (ChFC®)**

The ChFC® designation is offered by The American College. Designation holders are required to serve clients with the highest level of professionalism. The authority to use the ChFC® mark is granted by the Certification Committee of the Board of Trustees of The American College, and that privilege is contingent on adherence to strict ethical guidelines. All ChFC® advisors are required to do the same for clients that they would do for themselves in similar circumstances, the standard of ethical behavior most beneficial for their clients. Each ChFC® has taken 9 or more college-level courses on all aspects of financial planning. The average study time for the program is over 400 hours, and

advisors frequently spend years earning this coveted distinction. Each ChFC® must also complete a minimum of 30 hours of continuing education every two years and must meet extensive experience requirements to ensure that you get the professional financial advice you need.

### **Chartered Life Underwriter (CLU®)**

The CLU® is offered by The American College. The CLU® designation is obtained by completing 8 core, 3 elective courses and a final exam for each course. As a prerequisite the IAR must have 3 years of full time business experience within the 5 years preceding the awarding of the designation. All candidates must meet ethics standards and agree to comply with The American College Code of Ethics and Procedures. This designation requires 30 hours of continuing education every 2 years.

### **Certified Financial Planner™, CFP®**

The CFP® certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam and agreeing to be bound by the CFP® board's Standard of Professional Conduct. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the Standards of Professional Conduct.

### **Registered Health Underwriter® (RHU®)**

The RHU® is obtained by completing three college-level courses offered by The American College and passing a two-hour proctored exam for each course. Required courses for this program include *Group Benefits*, and *Advanced Topics in Group Benefits* as well as an elective covering individual health insurance and managed care. Applicants must have at least three years of full time experience in the field in order to be considered for the RHU®. This designation requires 30 hours of continuing education every two years and adherence to The American College's Code of Ethics.

## **Item 3: Disciplinary Information<sup>1</sup>**

There are no legal or disciplinary events material to the evaluation of Mr. Thiessen.

## **Item 4: Other Business Activities**

<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Mr. Thiessen is a licensed insurance agent/broker. He may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Thiessen, as a fiduciary, will act in the client's best interest.

### Item 5: Additional Compensation

Mr. Thiessen does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### Item 6: Supervision

Mr. Gates, Managing Member and Chief Compliance Officer of Clear Creek Financial Management, LLC, supervises and monitors Mr. Thiessen's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Gates if you have any questions about Mr. Thiessen's brochure supplement at (360) 308-8239.