

# Salida Financial Advice and Planning LLC

## Firm Brochure - Form ADV Part 2A

*This brochure provides information about the qualifications and business practices of Salida Financial Advice and Planning LLC. If you have any questions about the contents of this brochure, please contact us at (917) 363-1287 or by email at: [chris@salidafinancial.com](mailto:chris@salidafinancial.com). The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.*

*Additional information about Salida Financial Advice and Planning LLC is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). Salida Financial Advice and Planning LLC's IARD number is: 317464.*

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*Registration as an investment adviser does not imply a certain level of skill or training.*

Version Date: 09/23/2025

## Item 2: Material Changes

Removed inactive business phone number.

## Item 3: Table of Contents

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## Item 4: Advisory Business

Salida Financial Advice and Planning LLC (hereinafter "SFAPLLC") is a Limited Liability Company organized in the State of Colorado. The firm became registered as an investment adviser in December 2021. The principal owner is Christopher Michael Muecke.

### ***Full Service Financial Planning***

A complete service agreement may include but is not limited to financial planning, investment advice and implementation, cash flow planning, insurance review, estate planning review, income tax plan preparation, and income tax return preparation and filing.

### ***Project Limited Financial Planning***

Project Limited Financial Planning may include but is not limited to one or more of the following areas: financial planning, cash flow planning, insurance review, estate planning review, income tax plan preparation, and income tax return preparation and filing.

### ***Services Limited to Specific Types of Investments***

SFAPLLC generally limits its investment advice to mutual funds, fixed income securities, real estate funds (including REITs), insurance products including annuities, equities, ETFs (including ETFs in the gold and precious metal sectors), treasury inflation protected/inflation linked bonds, commodities and non-U.S. securities. SFAPLLC may use other securities as well to help diversify a portfolio when applicable.

SFAPLLC will tailor a program for each individual client. This will include an interview session to get to know the client's specific needs and requirements as well as a plan that will be executed by SFAPLLC on behalf of the client. SFAPLLC may use model allocations together with a specific set of recommendations for each client based on their personal restrictions, needs, and targets. Clients may impose restrictions in investing in certain securities or types of securities in accordance with their values or beliefs, which restrictions will be documented in the Investment Policy Statement. However, if the restrictions prevent SFAPLLC from properly servicing the client account, or if the restrictions would require SFAPLLC to deviate from its standard suite of services, SFAPLLC reserves the right to end the relationship.

SFAPLLC has the following assets under management:

Discretionary Amounts:	Non-discretionary Amounts:	Date Calculated:
\$0	\$14,000,000	September 2025

## Item 5: Fees and Compensation

### *Financial Planning Fees*

#### **Full Service Financial Planning**

The fixed rate for Full Service Financial Planning is between \$4,000 and \$15,000. The fees are negotiable, and the final fee schedule will be attached in the Agreement.

#### **Project Limited Financial Planning**

The fixed fee for these services is between \$1,000 and \$10,000. The fees are negotiable, and the final fee schedule will be attached in the Agreement.

Clients may terminate the agreement without penalty, for full refund of SFAPLLC's fees, within five business days of signing the Financial Planning Agreement. Thereafter, clients may terminate the Agreement with thirty days' written notice.

### *Payment of Financial Planning Fees*

Fixed Financial Planning fees are withdrawn directly from the client's accounts with client's written authorization or may be invoiced and billed directly to the client; clients may select the method in which they are billed. Fees are paid quarterly in advance. Please see Item 15 for additional information regarding direct fee deduction.

SFAPLLC collects fees in advance. Refunds for fees paid in advance but not yet earned will be refunded on a prorated basis and returned within fourteen days to the client via check or return deposit back into the client's account.

Fixed fees that are collected in advance will be refunded based on the prorated amount of work completed at the point of termination.

Clients are responsible for the payment of all third party fees (i.e. custodian fees, brokerage fees, mutual fund fees, transaction fees, etc.). Those fees are separate and distinct from the fees and expenses charged by SFAPLLC. Please see Item 12 of this brochure regarding broker-dealer/custodian.

Neither SFAPLLC nor its supervised persons accept any compensation for the sale of investment products, including asset-based sales charges or service fees from the sale of mutual funds.

## Item 6: Performance-Based Fees and Side-By-Side Management

SFAPLLC does not accept performance-based fees or other fees based on a share of capital gains on or capital appreciation of the assets of a client.

## Item 7: Types of Clients

SFAPLLC generally provides advisory services to the following types of clients:

- ❖ Individuals
- ❖ High-Net-Worth Individuals
- ❖ Charitable Organizations

There is no account minimum for any of SFAPLLC's services.

## Item 8: Methods of Analysis, Investment Strategies, & Risk of Loss

### *Methods of Analysis*

SFAPLLC's methods of analysis include Fundamental analysis, Modern portfolio theory and Quantitative analysis.

**Fundamental analysis** involves the analysis of financial statements, the general financial health of companies, and/or the analysis of management or competitive advantages.

**Modern portfolio theory** is a theory of investment that attempts to maximize portfolio expected return for a given amount of portfolio risk, or equivalently minimize risk for a given level of expected return, each by carefully choosing the proportions of various asset.

**Quantitative analysis** deals with measurable factors as distinguished from qualitative considerations such as the character of management or the state of employee morale, such as the value of assets, the cost of capital, historical projections of sales, and so on.

### *Investment Strategies*

SFAPLLC uses long term trading.

**Investing in securities involves a risk of loss that you, as a client, should be prepared to bear.**

### *Methods of Analysis*

**Fundamental analysis** concentrates on factors that determine a company's value and expected future earnings. This strategy would normally encourage equity purchases in stocks that are undervalued or priced below their perceived value. The risk assumed is that the market will fail to reach expectations of perceived value.

**Modern portfolio theory** assumes that investors are risk averse, meaning that given two portfolios that offer the same expected return, investors will prefer the less risky one. Thus, an investor will take on increased risk only if compensated by higher expected returns. Conversely, an investor who wants higher expected returns must accept more risk. The exact trade-off will be the same for all investors, but different investors will evaluate the trade-off differently based on individual risk aversion characteristics. The implication is that a rational investor will not invest in a portfolio if a second portfolio exists with a more favorable risk-expected return profile – i.e., if for that level of risk an alternative portfolio exists which has better expected returns.

**Quantitative analysis** Investment strategies using quantitative models may perform differently than expected as a result of, among other things, the factors used in the models, the weight placed on each factor, changes from the factors' historical trends, and technical issues in the construction and implementation of the models.

### *Investment Strategies*

**Long term trading** is designed to capture market rates of both return and risk. Due to its nature, the long-term investment strategy can expose clients to various types of risk that will typically surface at various intervals during the time the client owns the investments. These risks include but are not limited to inflation (purchasing power) risk, interest rate risk, economic risk, market risk, and political/regulatory risk.

**Investing in securities involves a risk of loss that you, as a client, should be prepared to bear.**

Clients should be aware that there is a material risk of loss using any investment strategy. The investment types listed below (leaving aside Treasury Inflation Protected/Inflation Linked Bonds) are not guaranteed or insured by the FDIC or any other government agency.

**Mutual Funds:** Investing in mutual funds carries the risk of capital loss and thus you may lose money investing in mutual funds. All mutual funds have costs that lower investment returns. The funds can be of bond "fixed income" nature (lower risk) or stock "equity" nature.

**Equity** investment generally refers to buying shares of stocks in return for receiving a future payment of dividends and/or capital gains if the value of the stock increases. The value of equity securities may fluctuate in response to specific situations for each company, industry conditions and the general economic environments.

**Fixed income** investments generally pay a return on a fixed schedule, though the amount of the payments can vary. This type of investment can include corporate and government debt securities, leveraged loans, high yield, and investment grade debt and structured products, such as mortgage and other asset-backed securities, although individual bonds may be the best known type of fixed income security. In general, the fixed income market is volatile and fixed income securities carry interest rate risk. (As interest rates rise, bond prices usually fall, and vice versa. This effect is usually more pronounced for longer-term securities.) Fixed income securities also carry inflation risk, liquidity risk, call risk, and credit and default risks for both issuers and counterparties. The risk of default on treasury inflation protected/inflation linked bonds is dependent upon the U.S. Treasury defaulting (extremely unlikely); however, they carry a potential risk of losing share price value, albeit rather minimal. Risks of investing in foreign fixed income securities also include the general risk of non-U.S. investing described below.

**Exchange Traded Funds (ETFs):** An ETF is an investment fund traded on stock exchanges, similar to stocks. Investing in ETFs carries the risk of capital loss (sometimes up to a 100% loss in the case of a stock holding bankruptcy). Areas of concern include the lack of transparency in products and increasing complexity, conflicts of interest and the possibility of inadequate regulatory compliance. Risks in investing in ETFs include trading risks, liquidity and shutdown risks, risks associated with a change in authorized participants and non-participation of authorized participants, risks that trading price differs from indicative net asset value (iNAV), or price fluctuation and disassociation from the index being tracked. With regard to trading risks, regular trading adds cost to your portfolio thus counteracting the low fees that one of the typical benefits of ETFs. Additionally, regular trading to beneficially “time the market” is difficult to achieve. Even paid fund managers struggle to do this every year, with the majority failing to beat the relevant indexes. With regard to liquidity and shutdown risks, not all ETFs have the same level of liquidity. Since ETFs are at least as liquid as their underlying assets, trading conditions are more accurately reflected in implied liquidity rather than the average daily volume of the ETF itself. Implied liquidity is a measure of what can potentially be traded in ETFs based on its underlying assets. ETFs are subject to market volatility and the risks of their underlying securities, which may include the risks associated with investing in smaller companies, foreign securities, commodities, and fixed income investments (as applicable). Foreign securities in particular are subject to interest rate, currency exchange rate, economic, and political risks, all of which are magnified in emerging markets. ETFs that target a small universe of securities, such as a specific region or market sector, are generally subject to greater market volatility, as well as to the specific risks associated with that sector, region, or other focus. ETFs that use derivatives, leverage, or complex investment strategies are subject to additional risks. Precious Metal ETFs (e.g., Gold, Silver, or Palladium Bullion backed “electronic shares” not physical metal) specifically may be negatively impacted by several unique factors, among them (1) large sales by the official sector which own a significant portion of aggregate world holdings in gold and other precious metals, (2) a significant increase in hedging activities by producers of gold or other precious metals, (3) a significant change in the attitude of speculators and investors. The return of an index ETF is usually different from that of the index it tracks because of fees, expenses, and tracking error. An ETF may trade at a premium or discount to its net asset value (NAV) (or indicative value in the case of exchange-traded notes). The

degree of liquidity can vary significantly from one ETF to another and losses may be magnified if no liquid market exists for the ETF's shares when attempting to sell them. Each ETF has a unique risk profile, detailed in its prospectus, offering circular, or similar material, which should be considered carefully when making investment decisions.

**Real estate** funds (including REITs) face several kinds of risk that are inherent in the real estate sector, which historically has experienced significant fluctuations and cycles in performance. Revenues and cash flows may be adversely affected by: changes in local real estate market conditions due to changes in national or local economic conditions or changes in local property market characteristics; competition from other properties offering the same or similar services; changes in interest rates and in the state of the debt and equity credit markets; the ongoing need for capital improvements; changes in real estate tax rates and other operating expenses; adverse changes in governmental rules and fiscal policies; adverse changes in zoning laws; the impact of present or future environmental legislation and compliance with environmental laws.

**Annuities** are a retirement product for those who may have the ability to pay a premium now and want to guarantee they receive certain monthly payments or a return on investment later in the future. Annuities are contracts issued by a life insurance company designed to meet requirement or other long-term goals. An annuity is not a life insurance policy. Variable annuities are designed to be long-term investments, to meet retirement and other long-range goals. Variable annuities are not suitable for meeting short-term goals because substantial taxes and insurance company charges may apply if you withdraw your money early. Variable annuities also involve investment risks, just as mutual funds do.

**Commodities** are tangible assets used to manufacture and produce goods or services. Commodity prices are affected by different risk factors, such as disease, storage capacity, supply, demand, delivery constraints and weather. Because of those risk factors, even a well-diversified investment in commodities can be uncertain.

**Non-U.S.** securities present certain risks such as currency fluctuation, political and economic change, social unrest, changes in government regulation, differences in accounting and the lesser degree of accurate public information available.

**Past performance is not indicative of future results. Investing in securities involves a risk of loss that you, as a client, should be prepared to bear.**

## **Item 9: Disciplinary Information**

There are no criminal, civil, administrative, or self-regulatory organization proceedings to report.

## **Item 10: Other Financial Industry Activities and Affiliations**

Neither SFAPLLC nor its representatives are registered as, or have pending applications to become, a broker/dealer, Futures Commission Merchant, Commodity Pool Operator, or Commodity Trading Advisor or an associated person of the foregoing entities.

Christopher Michael Muecke is an investment adviser representative with another investment advisory firm. From time to time, he may offer clients advice or products from those activities and clients should be aware that these services may involve a conflict of interest. SFAPLLC always acts in the best interest of the client. Clients have the right to utilize or decline to utilize the services of any representative of SFAPLLC in their outside capacity and have the right to purchase services or products recommended by SFAPLLC through another provider.

SFAPLLC does not utilize nor select third-party investment advisers.

## **Item 11: Code of Ethics, Participation or Interest in Client Transactions and Personal Trading**

SFAPLLC has a written Code of Ethics that covers the following areas:

- Prohibited Purchases and Sales
- Compliance Procedures
- Insider Trading
- Personal Securities Transactions
- Exempted Transactions
- Prohibited Activities
- Conflicts of Interest
- Gifts and Entertainment
- Confidentiality
- Service on a Board of Directors
- Compliance with Laws and Regulations
- Procedures and Reporting
- Certification of Compliance
- Reporting Violations
- Compliance Officer Duties
- Training and Education
- Recordkeeping
- Annual Review
- Sanctions

SFAPLLC will mitigate conflicts of interest by (i) disclosing to the client any conflict of interest and (ii) always acting in the best interest of the client consistent with its fiduciary duty. ALL PROSPECTIVE AND CURRENT CLIENTS HAVE A RIGHT TO SEE THIS CODE OF ETHICS. FOR A COPY OF THE CODE OF ETHICS, PLEASE ASK US AT ANY TIME.

SFAPLLC does not recommend that clients buy or sell any security in which a related person to SFAPLLC or SFAPLLC has a material financial interest.

From time to time, representatives of SFAPLLC may buy or sell securities for themselves at or around the same time they recommend those securities to clients. This may provide an opportunity for representatives of SFAPLLC to buy or sell the same securities before or after recommending the same securities to clients resulting in representatives profiting off the recommendations they provide to clients. Such transactions create a conflict of interest. SFAPLLC will always document any transactions that could be construed as conflicts of interest and will never engage in trading that operates to the client's disadvantage when similar securities are being bought or sold.

## **Item 12: Brokerage Practices**

Custodians/broker-dealers will be recommended based on SFAPLLC's duty to seek "best execution," which is the obligation to seek execution of securities transactions for a client on the most favorable terms for the client under the circumstances. Clients will not necessarily pay the lowest commission or commission equivalent, and SFAPLLC may also consider the market expertise and research access provided by the broker-dealer/custodian, including but not limited to access to written research, oral communication with analysts, admittance to research conferences and other resources provided by the brokers that may aid in SFAPLLC's research efforts.

SFAPLLC recommends Charles Schwab, Member FINRA/SIPC.

While SFAPLLC has no formal soft dollars program in which soft dollars are used to pay for third party services, SFAPLLC may receive research, products, or other services from custodians in connection with client securities transactions ("soft dollar benefits"). SFAPLLC may enter into soft-dollar arrangements consistent with (and not outside of) the safe harbor contained in Section 28(e) of the Securities Exchange Act of 1934, as amended. There can be no assurance that any particular client will benefit from soft dollar research, whether or not the client's transactions paid for it, and SFAPLLC does not seek to allocate benefits to client accounts proportionate to any soft dollar credits generated by the accounts. SFAPLLC benefits by not having to produce or pay for the research, products or services, and SFAPLLC will have an incentive to recommend a custodian based on receiving research or services. This constitutes a conflict of interest; however, this conflict is mitigated because soft dollar benefits can help SFAPLLC in its portfolio management and SFAPLLC will always act in the best interest of its clients, including in connection with selecting custodians. Clients should be aware that SFAPLLC's acceptance of soft dollar benefits may result in higher commissions charged to the client.

SFAPLLC receives no referrals from a broker-dealer or third party in exchange for using that broker-dealer or third party.

SFAPLLC may permit clients to direct it to execute transactions through a specified custodian. If a client directs brokerage, then the client will be required to acknowledge in writing that the

client's direction with respect to the use of custodians supersedes any authority granted to SFAPLLC to select custodians; this direction may result in higher commissions, which may result in a disparity between free and directed accounts; and trades for the client and other directed accounts may be executed after trades for free accounts, which may result in less favorable prices, particularly for illiquid securities or during volatile market conditions. Not all investment advisers allow their clients to direct brokerage.

SFAPLLC does not aggregate or bunch the securities to be purchased or sold for multiple clients. This may result in less favorable prices, particularly for illiquid securities or during volatile market conditions.

### **Item 13: Review of Accounts**

All client accounts for SFAPLLC's Full Service Financial Planning provided on an ongoing basis are reviewed at least quarterly by Christopher Michael Muecke, Managing Member and Chief Compliance Officer, with regard to clients' respective investment policies and risk tolerance levels. All accounts at SFAPLLC are assigned to this reviewer.

Reviews may be triggered by material market, economic or political events, or by changes in client's financial situations (such as retirement, termination of employment, physical move, or inheritance).

Each client will receive a quarterly statement detailing the client's account, including assets held, asset value, and calculation of fees, which will come from the custodian.

All Project Limited Financial Planning accounts are reviewed upon financial plan creation and plan delivery by Christopher Michael Muecke, Managing Member and Chief Compliance Officer. There is only one level of review for financial plans, and that is the total review conducted to create the financial plan.

Each financial planning client will receive the written financial plan upon completion.

### **Item 14: Client Referrals and Other Compensation**

Other than the soft dollar benefits disclosed in Item 12 above, SFAPLLC does not receive any economic benefit, directly or indirectly from any third party for advice rendered to SFAPLLC's clients.

SFAPLLC participates in the institutional advisor program (the "Program") offered by Charles Schwab. Schwab offers independent investment advisor services which include custody of securities, trade execution, clearance and settlement of transactions. SFAPLLC receives some benefits from Charles Schwab through its participation in the Program.

As disclosed above, SFAPLLC participates in Charles Schwab's institutional advisor program and SFAPLLC may recommend Charles Schwab to clients for custody and brokerage services. There is no direct link between SFAPLLC's participation in the Program and the investment advice it gives to its clients, although SFAPLLC receives economic benefits through its participation in the Program that are typically not available to Charles Schwab retail investors. These benefits include the following products and services (provided without cost or at a discount): receipt of duplicate client statements and confirmations; research related products and tools; consulting services; access to a trading desk serving SFAPLLC participants; access to block trading (which provides the ability to aggregate securities transactions for execution and then allocate the appropriate shares to client accounts); the ability to have SFAPLLC's fees deducted directly from client accounts; access to an electronic communications network for client order entry and account information; access to mutual funds with no transaction fees and to certain institutional money managers; and discounts on compliance, marketing, research, technology, and practice management products or services provided to SFAPLLC by third party vendors. Charles Schwab may also pay for business consulting and professional services received by SFAPLLC's related persons. Some of the products and services made available by Charles Schwab through the Program may benefit SFAPLLC but may not benefit its client accounts. These products or services may assist SFAPLLC in managing and administering client accounts, including accounts not maintained at Charles Schwab. Other services made available by Charles Schwab are intended to help SFAPLLC manage and further develop its business enterprise. The benefits received by SFAPLLC or its personnel through participation in the Program do not depend on the amount of brokerage transactions directed to Charles Schwab. As part of its fiduciary duties to clients, SFAPLLC endeavors at all times to put the interests of its clients first. Clients should be aware, however, that the receipt of economic benefits by SFAPLLC or its related persons in and of itself creates a conflict of interest and may indirectly influence the SFAPLLC's choice of Charles Schwab for custody and brokerage services.

SFAPLLC does not directly or indirectly compensate any person who is not advisory personnel for client referrals.

## **Item 15: Custody**

SFAPLLC does not have physical custody of client funds or securities. However, when advisory fees are deducted directly from client accounts at client's custodian, SFAPLLC will be deemed to have limited custody of a client's assets. For fees deducted directly from client accounts, in states that require it, SFAPLLC will:

- (A) Possess written authorization from the client to deduct advisory fees from an account held by a qualified custodian.
- (B) Utilize a custodian that sends at least quarterly statements reflecting all additions and deductions, including the amount of advisory fees.
- (C) Send the qualified custodian written notice of the amount of the fee to be deducted and send the client a written invoice upon or prior to fee deduction itemizing the fee,

including the formula used to calculate the fee, the time period covered by the fee, and the amount of assets under management on which the fee was based.

Clients will receive all account statements from the custodian and billing invoices from SFAPLLC that are required in each jurisdiction, and they should carefully review those statements for accuracy.

### **Item 16: Investment Discretion**

SFAPLLC does not have discretion over client accounts at any time.

### **Item 17: Voting Client Securities (Proxy Voting)**

SFAPLLC will not ask for, nor accept voting authority for client securities. Clients will receive proxies directly from the issuer of the security or the custodian. Clients should direct all proxy questions to the issuer of the security.

### **Item 18: Financial Information**

SFAPLLC neither requires nor solicits prepayment of more than \$500 in fees per client, six months or more in advance, and therefore is not required to include a balance sheet with this brochure.

Neither SFAPLLC nor its management has any financial condition that is likely to reasonably impair SFAPLLC's ability to meet contractual commitments to clients.

SFAPLLC has not been the subject of a bankruptcy petition in the last ten years.

### **Item 19: Requirements For State Registered Advisers**

SFAPLLC currently has only one management person: Christopher Michael Muecke. Education and business background can be found on the individual's Form ADV Part 2B brochure supplement.

SFAPLLC does not accept performance-based fees or other fees based on a share of capital gains on or capital appreciation of the assets of a client.

No management person at SFAPLLC or SFAPLLC has been found liable in an arbitration claim or been found liable in a civil, self-regulatory organization, or administrative proceeding that is material to the client's evaluation of the firm or its management.

Neither SFAPLLC, nor its management persons, has any relationship or arrangement with issuers of securities.

*This brochure supplement provides information about Christopher Michael Muecke that supplements the Salida Financial Advice and Planning LLC brochure. You should have received a copy of that brochure. Please contact Christopher Michael Muecke if you did not receive Salida Financial Advice and Planning LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Christopher Michael Muecke is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **Salida Financial Advice and Planning LLC**

Form ADV Part 2B – Individual Disclosure Brochure

*for*

### **Christopher Michael Muecke**

Personal CRD Number: 4433146

Investment Adviser Representative

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UPDATED: 09/23/2025



## Item 2: Educational Background and Business Experience

**Name:** Christopher Michael Muecke

**Born:** 1979

### **Educational Background and Professional Designations:**

#### **Education:**

Bachelor of Science Business Administration, University of Vermont - 2001

#### **Business Background:**

12/2021 - Present	Managing Member and Chief Compliance Officer Salida Financial Advice & Planning LLC
08/2013 - 12/31/2021	Financial Advisor & Member Cambridge Financial Advisors LLC
08/2004 - 05/2013	Senior Territory Business Manager Mead Johnson Nutrition

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

## Item 4: Other Business Activities

Christopher Michael Muecke is an investment adviser representative with another investment advisory firm. From time to time, he may offer clients advice or products from those activities and clients should be aware that these services may involve a conflict of interest. Salida Financial Advice and Planning LLC always acts in the best interest of the client. Clients have the right to utilize or decline to utilize the services of any representative of Salida Financial Advice and Planning LLC in their outside capacity and have the right to purchase services or products recommended by Salida Financial Advice and Planning LLC through another provider.

Christopher Michael Muecke and his wife own a small jewelry business, Rakkasse LLC dba Anatolia Arts. Approximately one hour per week is spent on this other business activity.

### **Item 5: Additional Compensation**

Christopher Michael Muecke does not receive any economic benefit from any person, company, or organization, other than Salida Financial Advice and Planning LLC in exchange for providing clients advisory services through Salida Financial Advice and Planning LLC.

### **Item 6: Supervision**

As the Chief Compliance Officer of Salida Financial Advice and Planning LLC, Christopher Michael Muecke supervises all activities of the firm. Christopher Michael Muecke's contact information is on the cover page of this disclosure document. Christopher Michael Muecke adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

## Item 7: Requirements For State Registered Advisers

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

- A. Christopher Michael Muecke has NOT been involved in any award or otherwise being found liable in an arbitration claim OR an award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding.
- B. Christopher Michael Muecke has NOT been the subject of a bankruptcy.