

Goodman Financial Corporation

Brochure Supplement – Part 2B of Form ADV Supervised Persons

Steven R. Goodman, Christopher A. Matlock, Wade D. Egmon, Charlotte M. Jungen, Morgann Zimmer, Chelsea A. Benoit, Anna P. Ceker, Lee Taylor, Benjamin C. McCue, Diana Castro, Steven J. VanNostrand, Linda McCoy, and Hunter W. Coday.

This Brochure Supplement provides information about the above Supervised Persons that supplements Goodman Financial Corporation's Form ADV Part 2A Brochure. You should have received a copy of that brochure. Please contact Charlotte Jungen, Chief Compliance Officer at the Firm if you did not receive Goodman Financial Corporation's Brochure or if you have any questions about the contents of this supplement.

Additional information about the above Supervised Persons is available on the SEC's website at www.adviserinfo.sec.gov.

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Professional Certifications

Employees have earned certifications and credentials that are required to be explained in further detail.

Certified Public Accountant (CPA)

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two year period or 120 hours over a three year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous *Code of Professional Conduct* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's *Code of Professional Conduct* within their state accountancy laws or have created their own. While various supervised persons of Goodman Financial are CPAs, this firm is not a CPA firm.

Certified Financial Planner™

The CERTIFIED FINANCIAL PLANNERTM, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 71,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two

hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and

- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Chartered Financial Analyst®

(CFA) is a globally respected, graduate-level investment credential established in 1962 and awarded by CFA Institute — the largest global association of investment professionals.

There are currently more than 90,000 CFA charterholders working in 134 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

High Ethical Standards

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA charterholders to:

- Place their clients' interests ahead of their own;
- Maintain independence and objectivity;
- Act with integrity;
- Maintain and improve their professional competence; and
- Disclose conflicts of interest and legal matters.

Global Recognition

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA charterholders—often making the charter a prerequisite for employment.

Additionally, regulatory bodies in 22 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

Comprehensive and Current Knowledge

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

Certified Employee Benefits Specialist

(CEBS) is a professional designation available in both the United States and Canada that indicates a human resource professional's expertise in employee benefits. The program is overseen by the Wharton School of Business at the University of Pennsylvania and at Dalhousie University in Canada. A certified employee benefit specialist has a vast understanding of compensation structures.

Steven R. Goodman

Item 2: Educational Background and Business Experience

Steven "Steve" R. Goodman, CPA, CFP® - President

Born in 1961

Education

Master of Science in Accountancy, University of Houston, 1985, Graduated with Honors

Bachelor of Science, University of Houston, 1983, Graduated with Honors

Professional Designations

Certified Public Accountant

CERTIFIED FINANCIAL PLANNER™ Professional

Business Experience and Background

Steve is Founder and President of Goodman Financial Corporation. Prior to Goodman Financial Corporation, Steve worked in public accounting for Ernst & Young as a tax consultant and subsequently with his own firm.

Prior 5 Years Work Experience

10/2018-present	Goodman Financial Corporation - President
3/2015-09/2018	Goodman Financial Corporation - President/Chief Investment Officer
1/1989-3/2015	Goodman Financial Corporation - President/Chief Investment Officer/Chief Compliance Officer

Item 3: Disciplinary Information

Steve Goodman does not have any legal or disciplinary events.

Item 4: Other Business Activities

Steve Goodman does not have any other investment-related business activities.

Item 5: Additional Compensation

Steve Goodman does not receive any additional economic benefit from third parties for providing advisory services.

Item 6: Supervision

Steve Goodman's advisory activities are supervised by Charlotte Jungen, Chief Compliance Officer & Chief Operating Officer. Charlotte Jungen can be contacted by phone at (713) 599-1777 or by email at cjungen@goodmanfinancial.com.

Christopher A. Matlock

Item 2: Educational Background and Business Experience

Christopher "Chris" A. Matlock, CFA, CPA - Chief Investment Officer

Born in 1958

Education

M.B.A., University of Houston, 1993

B.S., Accounting, University of Houston-Clear Lake, 1982

Professional Designations

Chartered Financial Analyst® Charterholder

Certified Public Accountant

Business Experience and Background

Chris has over 25 years of experience in portfolio management and investment analysis in addition to having over 10 years of experience in accounting and auditing. Prior to joining Goodman Financial in 2017 as Director - Portfolio Management, Chris served as Chairman and Chief Investment Officer of Lookout Capital Management, LP. He has also been Chief Investment Officer at Lighthouse Capital Management and served as Portfolio Manager of the Chase Bank/JP Morgan Fleming Asset Management Mid Cap Core Equity Mutual Fund and Assistant Portfolio Manager of the Texas Commerce Bank Small Cap Growth Fund.

Prior 5 Years Work Experience

10/2018 - Present Goodman Financial Corporation – Chief Investment Officer

07/2017 - 09/2018 Goodman Financial Corporation – Director - Portfolio Management

09/2011 - 07/2017 Lookout Capital Management, LP – Chairman and Chief Investment Officer

Item 3: Disciplinary Information

Chris Matlock does not have any legal or disciplinary events.

Item 4: Other Business Activities

Chris Matlock does not have any other investment-related business activities.

Item 5: Additional Compensation

Chris Matlock does not receive any additional economic benefit from third parties for providing advisory services.

Item 6: Supervision

Chris Matlock's advisory activities are supervised by Charlotte Jungen, Chief Compliance Officer & Chief Operating Officer. Charlotte Jungen can be contacted by phone at (713) 599-1777 or by email at cjungen@goodmanfinancial.com.

Wade D. Egmon

Item 2: Educational Background and Business Experience

Wade D. Egmon, CPA, CFP® - Senior Financial Advisor

Born in 1978

Education

M.P.A., Accounting, University of Texas at Austin, 2002

B.A., Accounting, Texas Lutheran University, 2001

Professional Designations

Certified Public Accountant

CERTIFIED FINANCIAL PLANNER™ Professional

Business Experience and Background

As Senior Financial Advisor, Wade's responsibilities include working with clients directly, addressing their financial planning needs. He also oversees client relationships and assists other team members with the more complex financial advisory issues. Prior to joining Goodman Financial, Wade served as a financial planner and income tax resource for a family office in Houston offering clients comprehensive financial planning services and targeted analysis. Additionally, Wade has six years of Big Four and small-firm tax experience, specializing in tax compliance and planning for high net worth individuals.

Prior 5 Years Work Experience

2/2021-present	Goodman Financial Corporation – Senior Financial Advisor
1/2020-2/2021	Goodman Financial Corporation – Director of Financial Advisory Services
9/2009-12/2019	Goodman Financial Corporation – Client Service Manager

Item 3: Disciplinary Information

Wade Egmon does not have any legal or disciplinary events.

Item 4: Other Business Activities

Wade Egmon does not have any other investment-related business activities.

Item 5: Additional Compensation

Wade Egmon does not receive any additional economic benefit from third parties for providing advisory services.

Item 6: Supervision

Wade Egmon's advisory activities are supervised by Charlotte Jungen, Chief Compliance Officer & Chief Operating Officer. Charlotte Jungen can be contacted by phone at (713) 599-1777 or by email at cjungen@goodmanfinancial.com.

Charlotte M. Jungen

Item 2: Educational Background and Business Experience

Charlotte M. Jungen, CPA, CFP® – Chief Compliance Officer & Chief Operating Officer

Born in 1975

Education

B.B.A., Accounting, Lamar University, 1997, Summa Cum Laude

Professional Designations

Certified Public Accountant

CERTIFIED FINANCIAL PLANNER™ Professional

Business Experience and Background

As Chief Operating Officer/Chief Compliance Officer, Charlotte’s responsibilities include executing on the firm’s vision, maintaining the firm’s compliance with applicable rules and regulations, managing the day-to-day operations of the firm, and overseeing the operations and compliance team that supports our financial advisory and investment teams. Prior to joining Goodman Financial in 2013, Charlotte was a shareholder of an accounting firm and concentrated in its financial advisory practice. Charlotte has over 20 years of experience in investment management, financial planning and consulting, insurance analysis and planning, estate planning, tax planning, accounting services, and compliance.

Prior 5 Years Work Experience

1/2020-present	Goodman Financial Corporation – Chief Compliance Officer & Chief Operating Officer
10/2018-12/2019	Goodman Financial Corporation – Director of Financial Advisory Services/ Chief Compliance Officer
3/2015- 09/2018	Goodman Financial Corporation – Client Service Manager/Chief Compliance Officer
10/2013-3/2015	Goodman Financial Corporation – Client Service Manager

Item 3: Disciplinary Information

Charlotte Jungen does not have any legal or disciplinary events.

Item 4: Other Business Activities

Charlotte Jungen does not have any other investment-related business activities.

Item 5: Additional Compensation

Charlotte Jungen does not receive any additional economic benefit from third parties for providing advisory services.

Item 6: Supervision

Charlotte Jungen’s advisory activities are supervised by Steve Goodman, President. Steve Goodman can be contacted by phone at (713) 599-1777 or by email at sgoodman@goodmanfinancial.com.

Morgann Zimmer

Item 2: Educational Background and Business Experience

Morgann Zimmer, CFP® – Senior Financial Advisor

Born in 1990

Education

Bachelor of Science in Agribusiness, Texas A&M University, 2012, Cum Laude

Professional Designations

CERTIFIED FINANCIAL PLANNER™ Professional

Business Experience and Background

As Senior Financial Advisor, Morgann's responsibilities include working with clients directly, addressing their financial planning needs. She also oversees client relationships and assists other team members with the more complex financial advisory issues. Prior to joining Goodman Financial in 2017, Morgann spent four years with KMH Wealth Management, LLC in Victoria, Texas. She worked closely supporting several financial advisors with client investments and financial plans.

Prior 5 Years Work Experience

06/2021 – Present	Goodman Financial Corporation – Senior Financial Advisor
09/2020 – 06/2021	Goodman Financial Corporation – Senior Associate Advisor
01/2017 – 09/2020	Goodman Financial Corporation – Associate Advisor
07/2016 - 12/2016	Unemployed
05/2012 - 06/2016	KMH Wealth Management, LLC - Intern/Assistant Portfolio Manager

Item 3: Disciplinary Information

Morgann Zimmer does not have any legal or disciplinary events.

Item 4: Other Business Activities

Morgann Zimmer does not have any other investment-related business activities.

Item 5: Additional Compensation

Morgann Zimmer does not receive any additional economic benefit from third parties for providing advisory services.

Item 6: Supervision

Morgann Zimmer's advisory activities are supervised by Charlotte Jungen, Chief Compliance Officer & Chief Operating Officer. Charlotte Jungen can be contacted by phone at (713) 599-1777 or by email at cjungen@goodmanfinancial.com.

Chelsea A. Benoit

Item 2: Educational Background and Business Experience

Chelsea A. Benoit, CFP® – Associate Advisor

Born in 1992

Education

B.B.A., Finance, Marketing, University of Houston, 2014, Summa Cum Laude

Professional Designations

CERTIFIED FINANCIAL PLANNER™ Professional

Business Experience and Background

As an Associate Advisor, Chelsea oversees the day-to-day relationship with her clients, addressing their financial advisory needs, participating in client meetings, and servicing their accounts. Prior to joining Goodman Financial in 2014, Chelsea interned with Advisors Ahead where she observed and contributed to the daily business of an established financial advisor in Houston.

Prior 5 Years Work Experience

09/2020-Present	Goodman Financial Corporation – Associate Advisor
01/2020-09/2020	Goodman Financial Corporation – Junior Planner
6/2014-12/2019	Goodman Financial Corporation – Junior Planner/Analyst
12/2013-5/2014	Advisors Ahead – Intern/Professional Associate
8/2012-5/2014	University of Houston – Student Worker
8/2010-5/2014	University of Houston – Student

Item 3: Disciplinary Information

Chelsea Benoit does not have any legal or disciplinary events.

Item 4: Other Business Activities

Chelsea Benoit does not have any other investment-related business activities.

Item 5: Additional Compensation

Chelsea Benoit does not receive any additional economic benefit from third parties for providing advisory services.

Item 6: Supervision

Chelsea Benoit’s advisory activities are supervised by Charlotte Jungen, Chief Compliance Officer & Chief Operating Officer. Charlotte Jungen can be contacted by phone at (713) 599-1777 or by email at cjungen@goodmanfinancial.com.

Anna P. Ceker

Item 2: Educational Background and Business Experience

Anna P. Ceker – Financial Planner

Born in 1990

Education

B.B.A., Finance, University of Houston, 2014

Business Experience and Background

As a Financial Planner, Anna works with our Senior Financial Advisors to address our clients' financial advisory needs, prepare financial plans and analysis, and service client accounts. Prior to joining Goodman Financial in 2014, Anna interned with Merrill Lynch where she assisted financial advisors and wealth managers with client acquisition activities and daily business operations.

Prior 5 Years Work Experience

9/2020-Present	Goodman Financial Corporation – Financial Planner
1/2020-9/2020	Goodman Financial Corporation – Junior Planner
6/2014-12/2019	Goodman Financial Corporation – Junior Planner/Analyst
9/2013-4/2014	Merrill Lynch – Client Associate/Intern

Item 3: Disciplinary Information

Anna Ceker does not have any legal or disciplinary events.

Item 4: Other Business Activities

Anna Ceker does not have any other investment-related business activities.

Item 5: Additional Compensation

Anna Ceker does not receive any additional economic benefit from third parties for providing advisory services.

Item 6: Supervision

Anna Ceker's advisory activities are supervised by Charlotte Jungen, Chief Compliance Officer & Chief Operating Officer. Charlotte Jungen can be contacted by phone at (713) 599-1777 or by email at cjungen@goodmanfinancial.com.

Lee J. Taylor

Item 2: Educational Background and Business Experience

Lee J. Taylor – Quantitative Data Analyst & Trader

Born in 1988

Education

Bachelor of Science, Finance, University of Northern Colorado, 2014

Business Experience and Background

Prior to joining Goodman Financial, Lee worked at Great Point Capital as an algorithmic trader. Additionally, Lee ran his own consulting firm, LJT Financial Analytics, advising with private equity deals and investment decision making.

Prior 5 Years Work Experience

01/2020-present	Goodman Financial Corporation – Quantitative Analyst & Trader
05/2018-12/2019	Goodman Financial Corporation – Analyst/Trader
05/2015-05/2018	LJT Financial Analytics - Consultant
10/2013-05/2015	Tower Hill Trading - Trader
01/2013-05/2014	University of North Colorado – Tutor

Item 3: Disciplinary Information

Lee Taylor does not have any legal or disciplinary events.

Item 4: Other Business Activities

Lee Taylor does not have any other investment-related business activities.

Item 5: Additional Compensation

Lee Taylor does not receive any additional economic benefit from third parties for providing advisory services.

Item 6: Supervision

Lee Taylor’s advisory activities are supervised by Charlotte Jungen, Chief Compliance Officer & Chief Operating Officer. Charlotte Jungen can be contacted by phone at (713) 599-1777 or by email at cjungen@goodmanfinancial.com.

Benjamin C. McCue

Item 2: Educational Background and Business Experience

Benjamin C. McCue, CFA – Investment Research Analyst

Born in 1982

Education

Master of Business Administration, Southern Methodist University, 2017

Bachelor of Arts, University of Texas at Austin, 2005

Professional Designations

Chartered Financial Analyst® Charterholder

Business Experience and Background

As Investment Research Analyst, Ben's responsibilities include investment research and monitoring existing firm holdings. Prior to joining Goodman Financial, Ben worked at MUFG Securities Americas, Inc. as an equity research associate providing investment research and analysis to institutional clients. Additionally, Ben worked for public corporations in a variety of roles including investor relations and corporate communications.

Prior 5 Years Work Experience

08/2020-present	Goodman Financial Corporation – Investment Research Analyst
01/2018-07/2020	MUFG Securities Americas, Inc. – Associate
08/2015-05/2017	Southern Methodist University – Student

Item 3: Disciplinary Information

Ben McCue does not have any legal or disciplinary events.

Item 4: Other Business Activities

Ben McCue does not have any other investment-related business activities.

Item 5: Additional Compensation

Ben McCue does not receive any additional economic benefit from third parties for providing advisory services.

Item 6: Supervision

Ben McCue's advisory activities are supervised by Charlotte Jungen, Chief Compliance Officer & Chief Operating Officer. Charlotte Jungen can be contacted by phone at (713) 599-1777 or by email at cjungen@goodmanfinancial.com.

Diana Castro

Item 2: Educational Background and Business Experience

Diana Castro, CPA, CFP® – Associate Advisor

Born in 1979

Education

Master in Professional Accounting, University of Texas at Austin, 2003

Bachelor of Business Administration with Honors, University of Texas at Austin, 2003

Professional Designations

Certified Public Accountant

CERTIFIED FINANCIAL PLANNER™ Professional

Business Experience and Background

As an Associate Advisor, Diana oversees the day-to-day relationship with her clients, addressing their financial advisory needs, participating in client meetings, and servicing their accounts. Prior to joining Goodman Financial in 2019, Diana worked as a Para Planner at a Houston-based RIA firm. In addition, she has approximately 15 years of experience working in corporate tax.

Prior 5 Years Work Experience

09/2020-present	Goodman Financial Corporation – Associate Advisor
12/2019-09/2020	Goodman Financial Corporation – Junior Planner
06/2018-11/2019	Insight Wealth Strategies – Para Planner
12/2014-05/2018	Forum Energy Technologies – Federal Tax Manager

Item 3: Disciplinary Information

Diana Castro does not have any legal or disciplinary events.

Item 4: Other Business Activities

Diana Castro does not have any other investment-related business activities.

Item 5: Additional Compensation

Diana Castro does not receive any additional economic benefit from third parties for providing advisory services.

Item 6: Supervision

Diana Castro's advisory activities are supervised by Charlotte Jungen, Chief Compliance Officer & Chief Operating Officer. Charlotte Jungen can be contacted by phone at (713) 599-1777 or by email at cjungen@goodmanfinancial.com.

Steven J. VanNostrand

Item 2: Educational Background and Business Experience

Steven J. VanNostrand, CFP® – Senior Financial Advisor

Born in 1980

Education

Bachelor of Arts, Psychology, University of Virginia, 2002

Professional Designations

CERTIFIED FINANCIAL PLANNER™ Professional

Business Experience and Background

As a Senior Financial Advisor, Steven works directly with clients, addressing their financial planning needs. He also oversees client relationships and assists other team members with more complex financial advisory issues. Prior to joining Goodman Financial, Steven was a wealth management advisor at TIAA for five years. Before that, he spent six years at Chase Bank and Bank of America in both branch management and client relationship management roles. He has over 11 years of experience in the financial services industry.

Prior 5 Years Work Experience

01/2021-present	Goodman Financial Corporation – Senior Financial Advisor
11/2015-11/2020	TIAA-CREF – Wealth Management Advisor

Item 3: Disciplinary Information

Steven VanNostrand does not have any legal or disciplinary events.

Item 4: Other Business Activities

Steven VanNostrand does not have any other investment-related business activities.

Item 5: Additional Compensation

Steven VanNostrand does not receive any additional economic benefit from third parties for providing advisory services.

Item 6: Supervision

Steven VanNostrand's advisory activities are supervised by Charlotte Jungen, Chief Compliance Officer & Chief Operating Officer. Charlotte Jungen can be contacted by phone at (713) 599-1777 or by email at cjungen@goodmanfinancial.com.

Linda McCoy

Item 2: Educational Background and Business Experience

Linda McCoy, CFP® – Chief Client Officer

Born in 1960

Education

Master of Business Administration, University of California, 1992

Bachelor of Business Administration, Arizona State University, 1982, Summa Cum Laude

Professional Designations

CERTIFIED FINANCIAL PLANNER™ Professional

Business Experience and Background

As Chief Client Officer, Linda's responsibilities include overseeing the firm's Financial Advisory Team and the execution of the client experience. In addition, she oversees Financial Advisory Team projects and initiatives while contributing to the strategic thinking and execution of the firm's vision. Prior to joining Goodman Financial, Linda was an industry speaker and Investor Education Instructor with TD Ameritrade. Most recently, she was a Branch Manager leading Client Service and Financial Consultant professionals who delivered goals-based financial planning and personalized solutions to clients. Linda has over 20 years of leadership experience in the financial services industry, in the areas of strategy, client relationship management, product and service development, and global implementation.

Prior 5 Years Work Experience

02/2021-present Goodman Financial Corporation – Chief Client Officer

07/2015-01/2021 TD Ameritrade – Branch Manager

Item 3: Disciplinary Information

Linda McCoy does not have any legal or disciplinary events.

Item 4: Other Business Activities

Linda McCoy does not have any other investment-related business activities.

Item 5: Additional Compensation

Linda McCoy does not receive any additional economic benefit from third parties for providing advisory services.

Item 6: Supervision

Linda McCoy's advisory activities are supervised by Charlotte Jungen, Chief Compliance Officer & Chief Operating Officer. Charlotte Jungen can be contacted by phone at (713) 599-1777 or by email at cjungen@goodmanfinancial.com.

Hunter W. Coday

Item 2: Educational Background and Business Experience

Hunter Coday – Associate Advisor

Born in 1998

Education

Bachelor of Science in Personal Financial Planning, Texas Tech University, 2020, Summa Cum Laude

Business Experience and Background

As an Associate Advisor, Hunter oversees the day-to-day relationship with his clients, addressing their financial advisory needs, participating in client meetings, and servicing their accounts. Hunter attended Texas Tech University’s Personal Financial Planning program where he was able to prepare for a role in financial planning through volunteering in programs such as Red to Black® Peer Financial Coaching, Knowledge Empowering You Outreach, and serving as a student ambassador. During his time at Texas Tech, Hunter also completed an internship with another Houston-based investment advisory firm where he was able to gain valuable experience learning the day-to-day workings of a financial advisor in Houston.

Prior 5 Years Work Experience

06/2021-Present	Goodman Financial Corporation – Associate Advisor
01/2021-06/2021	Goodman Financial Corporation – Financial Planner
07/2020-12/2020	Goodman Financial Corporation – Financial Planning Analyst
05/2019-12/2019	The Financial Advisory Group, Inc – Financial Planning Intern
08/2016-05/2020	Student – Texas Tech University

Item 3: Disciplinary Information

Hunter Coday does not have any legal or disciplinary events.

Item 4: Other Business Activities

Hunter Coday does not have any other investment-related business activities.

Item 5: Additional Compensation

Hunter Coday does not receive any additional economic benefit from third parties for providing advisory services.

Item 6: Supervision

Hunter Coday’s advisory activities are supervised by Charlotte Jungen, Chief Compliance Officer & Chief Operating Officer. Charlotte Jungen can be contacted by phone at (713) 599-1777 or by email at cjungen@goodmanfinancial.com.