



Bryce H. Brennan

PSI CAPITAL MANAGEMENT

147 North Shippen Street
Lancaster, PA 17602

Telephone: 717-207-7123
Facsimile: 717-291-1529

www.visitpsionlione.com

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**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Bryce Howard Brennan that supplements the brochure for Planning Strategies, Inc. dba PSI Capital Management (hereafter "PSICM"). You should have received a copy of that brochure. Contact us at (717)207-7123 if you did not receive PSI Capital Management's brochure or if you have any questions about the contents of this supplement.

Additional information about Bryce H. Brennan (CRD # 7648245) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Your Financial Advisor: **Bryce H. Brennan**

Year of Birth: 2001

Education:

- Pennsylvania Western University, BS Finance, 8/2021 - 12/2023
- Pennsylvania Western University, MBA, 12/2023 - 5/2025

Business Background:

- PSI Capital Management, Chief Compliance Officer (CCO), February 2026 - Present
- Planning Strategies, Inc. (*doing business as PSI Capital Management since April 2018*), Financial Advisor, 5/2023 - Present
- Transition Wealth Management, Investment Advisor Representative/ Chief Compliance Officer, 9/2022 - 3/2023
- Transition Advisor Group, Advisor, 5/2022 - 3/2023
- Army National Guard, Vehicle Mechanic, 6/2020 – Present

Certifications: **CFP, RICP®**

CERTIFIED FINANCIAL PLANNER™ (CFP®)

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

Education - Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination - Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience - Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics - Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics - Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in

the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client. **Continuing Education** - Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

RETIREMENT INCOME CERTIFIED PROFESSIONAL (RICP®)

Bryce H. Brennan holds the professional designation of Retirement Income Certified Professional® (RICP®).

The RICP® designation is a credential awarded by the American College to individuals who satisfy its educational, work experience and ethics requirements.

To successfully complete the three (3) required courses, students need to pass a 100-question proctored exam for each course. The program typically takes 18 months to complete the courses. In addition to the educational requirement, candidates for the RICP® credential must:

- Satisfy a 3-year experience requirement
- Adhere to The American College's Code of Ethics.
- Participate in The College's PACE continuing education program, completing 15 hours of acceptable CE credits every two years and complying with recertification reporting and requirements.

For additional information about this credential, please refer directly to the website of the issuing organization.

Item 3 Disciplinary Information

PSICM is required to disclose the facts of any legal or disciplinary events that are material to a client's evaluation of Bryce H. Brennan. PSICM does not have any required disclosures to this Item.

Item 4 Other Business Activities

Bryce H. Brennan is a licensed insurance agent in Mechanicsburg, Pennsylvania. In this capacity, he offers fixed insurance products. This activity is investment-related. He does not spend any time on this business during trading hours. Mr. Brennan devotes less than 10% of his professional time as such.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Brennan's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of PSI Capital Management's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Matthew C. Staub, Chief Operating Officer, is responsible for supervising Bryce H. Brennan's advisory

activities on behalf of PSICM. Mr. Staub's phone number is (717) 207-7123.

PSICM supervises its personnel and the investments made in client accounts. PSICM monitors the investments recommended by Bryce H. Brennan to ensure those investments are suitable for the particular client and periodically reviews his advisory activities, which may include individual client accounts and correspondence (including emails) sent to and received by Bryce H. Brennan.