



**Steven M. Mitchell**

**PSI CAPITAL MANAGEMENT**

147 North Shippen Street  
Lancaster, PA 17602

**Telephone: 717- 207-7123**

**Facsimile: 717-291-1529**

**[www.visitpsionline.com](http://www.visitpsionline.com)**

**March 31, 2026**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Steven M. Mitchell that supplements the brochure for Planning Strategies, Inc. dba PSI Capital Management (hereinafter "PSICM"). You should have received a copy of that brochure. Please 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 Steven M. Mitchell is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

Your Financial Adviser: **Steven M. Mitchell**

Year of Birth: 1955

Education:

- Boston University, M.S., Business Administration, 1984
- Shippensburg University, B.S., Business Administration, 1977

Business Background

- Planning Strategies, Inc. (*doing business as PS/ Capital Management since April 2018*), Investment Advisor Representative, January 2022 - Present
- Planning Strategies, Inc. (*doing business as PS/ Capital Management since April 2018*), CFO/COO, September 2001 - January 2022

## 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 Steven M. Mitchell. PSICM does not have any required disclosures to this Item.

## Item 4 Other Business Activities

PSICM is required to disclose information regarding any investment-related business or occupation in which Steven M. Mitchell is actively engaged.

### Real Estate

Mr. Mitchell has one half ownership in MFS Group, LLC. MFS Group, LLC is the legal owner of the office building for PSICM located at 147 North Shippen Street, Lancaster, Pennsylvania. PSICM pays rent to MFS Group, LLC and other than time spent for accounting and taxes Mr. Mitchell devotes less than 10% of his professional time as such. Mr. Mitchell's role in MFS Group, LLC does not create a conflict of interest to his provision of advisory services through PSICM.

Steven is a contract pilot for Clair Global. Mr. Mitchell devotes less than 10% of his professional time as such to this activity.

## Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Steven Mitchell's receipt of additional compensation.

Also, please refer to the *Fees and Compensation* section and the *Client Referrals and Other Compensation* section of PSICM's firm brochure for additional disclosures on this topic.

## Item 6 Supervision

Bryce H. Brennan, Chief Compliance Officer, is responsible for supervising Steven M. Mitchell's advisory activities on behalf of PSICM. Mr. Brennan's phone number is (717) 207-7123.

PSICM supervises its personnel and the investments made in client accounts. PSICM monitors the investments recommended by Steven M. Mitchell to ensure those investments are suitable for the particular client and consistent with their investment needs, goals, objectives and risk tolerance as well as any restrictions requested by the client.

PSICM periodically reviews the advisory activities of Steven M. Mitchell, which may include reviewing individual client accounts and correspondence (including emails) sent to and received by Steven M. Mitchell.