



**Vanessa M. Zook**  
CRD# 6111776

**PSI CAPITAL MANAGEMENT**

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**March 31, 2026**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement (Form ADV Part 2B) provides information about Vanessa M. Zook 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 Vanessa M. Zook (CRD# 6111776) 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: **Vanessa M. Zook**

Year of Birth: 1981

Education:

- Millersville University of Pennsylvania, MBA Business Administration, 2008
- University of Pittsburgh, BS Business Administration, 2003

Business Background:

- Planning Strategies, Inc. (*doing business as PSI Capital Management since April 2018*), Human Resource Officer, 1/2022 - Present
- Planning Strategies, Inc. (*doing business as PSI Capital Management since April 2018*), Creative Director, 1/2019 - 1/2022
- Planning Strategies, Inc. (*doing business as PSI Capital Management since April 2018*), Investment Adviser Representative, 9/2017 - Present
- Planning Strategies, Inc. (*doing business as PSI Capital Management since April 2018*) Insurance Agent, 7/2017 - 9/2017
- Vanessa Zook dba VZ Planning, Owner/Insurance Agent, 01/2017 - 07/2017
- Guardian Life Insurance & Annuity Company, Inc. (GIAC), Registered Representative, 6/2013 - 12/2016
- Guardian Life Insurance & Annuity Company, Inc. (GIAC), Insurance Agent Broker, 8/2012 - 6/2013
- Paradise Energy Solutions, LLC, Marketing Manager, 11/2011 - 5/2012
- PeopleMation LLC, Marketing Manager, 3/2011 - 11/2011

Certifications: **CFP**

### **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](http://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.

### 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 Vanessa M. Zook. PSICM does not have any required disclosures to this Item.

### Item 4 Other Business Activities

Vanessa Marie Zook is not actively engaged in any other business or occupation (investment-related or otherwise) beyond her capacity as Investment Adviser Representative of PSI Capital Management. Moreover, Ms. Zook does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

### Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Vanessa M. Zook's receipt of additional compensation.

Also, 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 Vanessa M. Zook'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 Vanessa M. Zook to ensure those investments are suitable for the particular client and periodically reviews her advisory activities, which may include individual client accounts and correspondence (including emails) sent to and received by Vanessa M. Zook.