

*This brochure supplement provides information about Kyle John Hart that supplements the Coastal Wealth Planners LLC brochure. You should have received a copy of that brochure. Please contact Kyle John Hart if you did not receive Coastal Wealth Planners LLC's brochure or if you have any questions about the contents of this supplement.*

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

## **Coastal Wealth Planners LLC**

Form ADV Part 2B – Individual Disclosure Brochure

*for*

### **Kyle John Hart**

Personal CRD Number: 5918073

Investment Adviser Representative

Coastal Wealth Planners LLC  
3 Maplewood Ct  
Barnegat, NJ 08005  
(732) 554-1099  
[kyle.hart@coastal-wp.com](mailto:kyle.hart@coastal-wp.com)

UPDATED: 06/25/2020

## Item 2: Educational Background and Business Experience

**Name:** Kyle John Hart      **Born:** 1984

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

#### **Education:**

BS Business, Fairleigh Dickinson University - 2007

#### **Business Background:**

08/2019 - Present	Founder & Financial Planner Coastal Wealth Planners LLC
10/2015 - 07/2019	Financial Consultant Fidelity Investments
10/2013 - 10/2015	Financial Advisor UBS
04/2011 - 10/2013	Financial Advisor Merrill Lynch
08/2009 - 04/2011	Sales Consultant Duck Harbor Energy Consultants

## 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

Kyle John Hart is a licensed insurance agent. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary

duties of a registered investment adviser. Coastal Wealth Planners LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of Coastal Wealth Planners LLC in their capacity as a licensed insurance agent.

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

Kyle John Hart does not receive any economic benefit from any person, company, or organization, other than Coastal Wealth Planners LLC in exchange for providing clients advisory services through Coastal Wealth Planners LLC.

### **Item 6: Supervision**

As the Chief Compliance Officer of Coastal Wealth Planners LLC, Kyle John Hart supervises all activities of the firm. Kyle John Hart's contact information is on the cover page of this disclosure document. Kyle John Hart 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. Kyle John Hart has NOT been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
  2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
- B. Kyle John Hart has NOT been the subject of a bankruptcy.