

Part 2B of Form ADV: *Brochure Supplement*

Donna Marie Chaney

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DONNA CHANEY CPA/PFS
FINANCIAL PLANNING & INVESTMENT MANAGEMENT

INDEPENDENT ■ STRATEGIC ■ STRAIGHTFORWARD ■ TRANSPARENT

FINANCIAL PLANNING
FOR THE LIFE YOU WANT
TODAY *and* TOMORROW

This brochure supplement provides information about Donna Marie Chaney that supplements the Chaney Financial Services, Inc. (CFS) brochure. You should have received a copy of that brochure. Please contact Donna Chaney if you did not receive Chaney Financial Services, Inc.'s brochure or if you have any questions about the contents of this supplement.

Additional information about Donna Chaney is available on the SEC's website at www.adviserinfo.sec.gov. You can search this site using a unique identifying number, known as a CRD number. CFS' number is CRD #145602 and Donna's is CRD #4769864.

Item 2- Educational, Background and Business Experience

Full Legal Name: Donna Marie Chaney

Born: 1959

Education

- Lehigh University; B.S., Accounting; 1981
- UCLA; Certificate in Personal Financial Planning; 2007

Business Experience

- Chaney Financial Services, Inc.; President and Chief Compliance Officer; November 2007 to Present
- Ameriprise Financial Services, Inc.; Financial Advisor; June 2004 to November 2007

Designations

Donna Chaney has earned the following designations and is in good standing with the granting authorities:

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 (in California, 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum experience levels (California requires at least one year of general accounting experience providing services that involve the use of accounting, attest (a minimum of 500 hours), 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, California requires the completion of 80 hours of continuing education over a two-year period with a minimum of 20 in any one year including four hours of ethics every two years and a two-hour course on the rules and regulations of the California Accountancy Act and the rules of professional conduct every six years.

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 and competence, and fully disclose any conflicts of interest (and obtain client consent if a conflict exists), avoid conflicts which impair their objectivity, maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The California Board of Accountancy, in addition to adopting the AICPA Code of Professional Conduct within its state accountancy laws, has created the California Accountancy Act, California Board of Accountancy Regulations and relevant provisions of the California Code of Regulations, all of which form the basis for the regulation of CPAs licensed in California.

Personal Financial Specialist (PFS). The PFS credential demonstrates that an individual has met the minimum education, experience and testing required of a CPA in addition to a minimum level of expertise in personal financial planning. To attain the PFS credential, a candidate must hold an unrevoked CPA license, fulfill 3,000 hours of personal financial planning business experience, complete 80 hours of personal financial planning CPE credits, pass a comprehensive financial planning exam and be an active member of the AICPA. A PFS credential holder is required to adhere to AICPA's Code of Professional Conduct, and is encouraged to follow AICPA's Statement on

Responsibilities in Financial Planning Practice. To maintain a PFS credential, the recipient must complete 60 hours of financial planning CPE credits every three years. The PFS credential is administered through the AICPA.

- CPA (Certified Public Accountant); 1983
- CPA/PFS (Personal Financial Specialist); 2006

Item 3 - Disciplinary Information

Donna Chaney has no reportable disciplinary history.

Item 4 - Other Business Activities

Investment-Related Activities

Donna Chaney is not engaged in any other investment-related activities. She does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

Non-Investment-Related Activities

Donna Chaney is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of her time.

Item 5 - Additional Compensation

Donna Chaney does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6 - Supervision

Donna Chaney, as sole owner, is responsible for all supervision and monitoring of investment advice offered to clients. She can be reached at 626-768-0080. While the underlying securities within accounts are continually monitored, Chaney reviews these accounts at least quarterly. Accounts are reviewed in the context of each client's stated investment objectives and guidelines. More frequent reviews may be triggered by material changes in variables such as the client's individual circumstances, or the market, political or economic environment.

Item 7 - Requirements for State-Registered Advisers

1. Donna Chaney has not been 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. Donna Chaney has not been 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.

3. Donna Chaney has not been the subject of a bankruptcy petition.