

*This brochure supplement provides information about Luciana Monteiro Reis that supplements the Granite Financial Partners LLC brochure. You should have received a copy of that brochure. Please contact Luciana Monteiro Reis if you did not receive Granite Financial Partners LLC's brochure or if you have any questions about the contents of this supplement.*

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

## **Granite Financial Partners LLC**

Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Luciana Monteiro Reis**

Personal CRD Number: 6583401

Investment Adviser Representative

Granite Financial Partners LLC  
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Melrose, MA 02176  
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UPDATED: 06/15/2020

## Item 2: Educational Background and Business Experience

**Name:** Luciana Monteiro Reis      **Born:** 1987

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

#### **Education:**

Master of Science in Financial Planning Financial Planning and Taxation, Bentley University - 2013

Bachelor of Science in Corporate Finance and Accounting Corporate Finance and Accounting, Bentley University - 2012

#### **Designations:**

##### **CFP® - Certified Financial Planner**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- ii. Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### **Business Background:**

06/2020 - Present	Investment Adviser Representative Granite Financial Partners LLC
04/2020 - Present	Founder/CEO Reis Consulting, LLC
09/2017 - 03/2020	Director of Strategic Solutions The MFA Companies
06/2013 - 08/2017	Financial Planner Lake Street Advisors LLC
01/2010 - 05/2013	Compliance Officer and Loan Processor MJ Mortgage Corporation

### **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**

Luciana Monteiro Reis is an accountant. From time to time, she will offer clients advice or products from this activity. Granite Financial Partners LLC always acts in the best interest of the client. Clients are in no way required to utilize the services of any representative of Granite Financial Partners LLC in their capacity as an accountant.

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

Luciana Monteiro Reis does not receive any economic benefit from any person, company, or organization, other than Granite Financial Partners LLC in exchange for providing clients advisory services through Granite Financial Partners LLC.

#### **Item 6: Supervision**

As a representative of Granite Financial Partners LLC, Luciana Monteiro Reis is supervised by Jonathan Edwards, the firm's Chief Compliance Officer. Jonathan Edwards is responsible for ensuring that Luciana Monteiro Reis adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Jonathan Edwards is (603) 554-8551.