

Firm Brochure Supplement

Cornerstone Planning Group, Inc.

350 Passaic Avenue, Suite 201
Fairfield, New Jersey 07004

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Supervised Person

Taylor B. Hodges, Financial Advisor, CFP

Located at:
2001 Thomasville Road
Tallahassee, FL, 32308
850-688-9079

BROCHURE SUPPLEMENT, March 2025

This brochure supplements information about the above referenced individual, which supplements Cornerstone Financial Planning Group Inc.'s ("Cornerstone Planning") Form ADV Part 2A ("Brochure"). You should have received a copy of the Brochure. If you did not, or if you have questions about the contents of this supplement, please contact the Compliance Department at the phone number listed above.

Additional information about the above-referenced Supervised Person is available on the SEC's website at www.adviserinfo.sec.gov. SEC or state registration does not and should not imply any certain level of skill or training.

Taylor B. Hodges, CFP, CEPA

CRD # 5911064

Item 2. Educational Background and Business Experience

Born: 1990

Education

2012- Bachelor of Science, Marketing, Florida State University

Business Background

Cornerstone Planning Group, Investment Advisor Representative, 05/2022 - Present

Southern Capital, Managing Member, 02/2016 - Present

Latitude Advisors, Investment Advisor Representative, 02/2016 – 04/2022

GWN Securities, Registered Representative, 02/2016 – 04/2022

Item 3. Disciplinary Information

Cornerstone Planning is required to disclose the pertinent facts regarding any legal or disciplinary events material to a client's evaluation of Taylor Hodges. Cornerstone Planning has no information to disclose in relation to this Item.

Item 4. Other Business Activities

Licensed Insurance Agent

Taylor Hodges is a licensed insurance agent with various insurance companies and, in such capacity, may recommend, on a fully disclosed commission basis, the purchase of certain insurance products. A conflict of interest exists to the extent that Cornerstone Planning recommends the purchase of insurance products where Taylor Hodges receives insurance commissions or other additional compensation. Any commissions received do not offset advisory fees the Client may pay for advisory services under the Firm. Clients are not required to purchase insurance products through Taylor Hodges and may seek similar services elsewhere.

Southern Capital Business Consulting

Through this entity, Taylor Hodges provides business advisory consulting services. These services include, but is not limited to, providing risk, tax and exit planning analysis. As part of these services, Mr. Hodges may recommend to the principals of the company to engage Cornerstone Planning for advisory services, including wealth management. Clients are not required to engage Cornerstone Planning and are free to seek similar services elsewhere.

Item 5. Additional Compensation

Taylor Hodges does not receive an economic benefit for providing advisory services from someone that is not a client of Cornerstone Planning.

Item 6. Supervision

The activities of all employees, including Taylor Hodges, are subject to Cornerstone Planning's compliance policies, procedures and code of ethics. Collectively, these procedures are administered by the Compliance Department and supervised by the Chief Compliance Officer, whose contact information is provided on the cover page.

FINANCIAL DESIGNATION EXPLANATIONS

CERTIFIED FINANCIAL PLANNER (tm) (CFP)

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. Currently, more than 62,000 individuals have obtained CFP certification in the United States.

CERTIFIED EXIT PLANNING ADVISOR, TM(CEPA)

The Certified Exit Planning Advisor (CEPA) Credentialing Program is the only program of its kind. Developed by nationally recognized experts in the field of exit planning and value acceleration, the CEPA program is a week long executive MBA-style program that includes 17 modules taught by a diverse faculty of industry experts. Participants who complete the CEPA program and pass the closed book proctored exam, receive the CEPA credential. The Value Acceleration MethodologyTM is your strategic framework for executing an exit strategy as a holistic advisor. This methodology integrates exit strategy into business, personal, and financial goals of the business owner. Throughout your CEPA training you will learn the three major components of exit planning, referred to as Master Planning or the "Three Legs of the Stool." Maximizing Business Value, Personal Financial Planning, and Life After Business Planning