

Item 1 Cover Page

SUPERVISED PERSON BROCHURE
FORM ADV PART 2B

Barbara Hollis Shingler

Holistic Planners Network, LLC

Main Office Address:

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PMB 202, Washington D.C. 20006
Tel: 240-508-2169

Additional Office Address:

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Waldorf, MD 20601
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Email:

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This brochure supplement provides information about Barbara Hollis and supplements the Holistic Planners Network, LLC brochure. You should have received a copy of that brochure. Please contact Barbara Hollis if you did not receive the brochure or if you have any questions about the contents of this supplement.

Additional information about Barbara Hollis (CRD #2208181) is available on the SEC's website at www.adviserinfo.sec.gov.

Brochure Supplement (Part 2B of Form ADV)

Supervised Person Brochure

Barbara Hollis Shingler

- Year of birth: 1948
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Item 2 - Educational Background and Business Experience

Educational Background:

- Columbia University; Master of Business Administration-Finance & Accounting; 1977
- Coppin State University; Bachelor of Science – Mathematics & Computer Science; 1974

Business Experience:

- Holistic Planners Network, LLC; Investment Advisor Representative; 02/2024-Present
 - Hollis & Shingler Financial Coaching Essentials, L.L.C.; Owner/Consultant/Insurance Agent; 06/2023-Present
 - Sole Proprietor dba Hollis & Shingler Financial Coaching Essentials; Insurance Agent/Consultant; 10/2020-Present
 - Archer Investment Corporation; Investment Advisor Representative; 11/2020-12/2023
 - Thrivent Investment Management, Inc.
 - Investment Advisor Representative; 08/2017-07/2020
 - Registered Representative; 03/2013-07/2020
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Item 3 - Disciplinary Information

- A. Ms. Shingler has never been involved in a criminal or civil action in a domestic, foreign or military court of competent jurisdiction for which she:
1. Was convicted of, or pled guilty or nolo contendere (“no contest”) to (a) any felony; (b) misdemeanor that involved investments or an investment-related business, fraud, false statement or omissions, wrongful taking of property, bribery, perjury, counterfeiting, or extortion; or (c) a conspiracy to commit any of these offenses;
 2. Is the named subject of a pending criminal proceeding that involves an investment-related business, fraud, false statements or omissions, wrongful taking of property, bribery, perjury, forgery, counterfeiting, extortion, or a conspiracy to commit any of these offenses;
 3. Was found to have been involved in a violation of an investment-related statute or regulation; or
 4. Was the subject of any order, judgement or decree permanently or temporarily enjoining, or otherwise limiting, him from engaging in any investment related activity, or from violating any investment-related statute, rule, or order.
- B. Ms. Shingler has never had an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency, or any foreign financial regulatory authority in which she:

1. Was found to have caused an investment-related business to lose its authorization to do business; or the subject of an order by the agency or authority;
 2. Was found to have been involved in a violation of an investment-related statute or regulation or was the subject of an order by the agency or authority;
(a) denying, suspending or revoking the authorization of the supervised person to act in an investment-related business; (b) barring or suspending his association with an investment-related business; (c) otherwise significantly limiting his investment-related activities; or (d) imposing a civil money penalty of more than \$2,500 on her.
- C. Ms. Shingler has never been the subject of a self-regulatory organization (SRO) proceeding in which she:
1. Was found to have caused an investment-related business to lose its authorization to do business; or
 2. Was found to have been involved in a violation of the SRO's rules and was: (a) barred or suspended from membership or from association with other members, or was expelled from membership; (b) otherwise significantly limited from investment-related activities; or (c) fined more than \$2,500.
- D. Ms. Shingler has not been involved in any other hearing or formal adjudication in which a professional attainment, designation, or license of the supervised person was revoked or suspended because of a violation of rules relating to professional conduct.

Item 4 - Other Business Activities

Barbara Shingler is also a licensed insurance agent/consultant/tax preparer with Hollis & Shingler Financial Coaching Essentials, L.L.C. Approximately 50% of Ms. Shingler's time is spent on this business practice. From time to time, she will offer clients products and/or services from this practice.

This practice represents a conflict of interest because it gives an incentive to recommend products based on the commission/compensation amount received. This conflict is mitigated by disclosures, procedures and the firm's fiduciary obligation to place the best interest of the Client first and the Clients are not required to purchase any products or services. Clients have the option to purchase these products through another insurance agent, consultant or tax preparer of their choosing.

Item 5 - Additional Compensation

Ms. Shingler receives additional commissions/compensation in her capacity as an insurance agent, consultant and tax preparer. She does not receive any performance-based fees.

Item 6 - Supervision

Ms. Shingler is supervised by Demetrius Felder, Compliance Officer. He reviews Ms. Shingler's work through client account reviews, quarterly personal transaction reports as well as face-to-face and phone interactions. Mr. Felder can be reached at d.felder@holisticplannersnetwork.com or 240-508-2169.

Item 7 - Requirements for State-Registered Advisors

- A. Ms. Shingler has not been involved in any of the following:
1. An award or otherwise 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;
 - e) Dishonest, unfair or unethical practices.
 2. An award or otherwise 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;
 - e) Dishonest, unfair or unethical practices.
- B. Ms. Shingler has never been the subject of a bankruptcy petition.