



Brochure Supplement

For

Heather C. Liston

**Global Retirement Partners, LLC
www.grpfinancial.com**

2460 Larkin Street, San Francisco, CA 94109

(415) 867-8703

Heather@ListonFinancialPlanning.com

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This brochure supplement provides information about Heather C. Liston that supplements the Global Retirement Partners, LLC, brochure. You should have received a copy of that brochure. Please contact Heather C. Liston if you did not receive the firm's brochure or if you have any questions about the contents of this supplement. Additional information about Heather C. Liston, CFP® is available on the Securities & Exchange Commission's website at www.adviserinfo.sec.gov. Registration with the United States Securities & Exchange Commission or any state securities authority does not imply a certain level of skill or training.

Table of Contents

Educational Background and Business Experience	3
Disciplinary Information.....	4
Other Business Activities.....	4
Additional Compensation	5
Supervision	5
Requirements for State-Registered Advisers.....	5

EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Heather C. Liston, CFP®

Year of Birth: 1961

Education:

- Princeton University, A.B., Liberal Arts, 1983
- New York University Graduate School of Business Administration, M.S., Accounting, 1984
- University of California at Berkeley Extension, Certificate in Personal Financial Planning, 2012

Professional Designations:

CERTIFIED FINANCIAL PLANNER™ (CFP®)

Issuing Organization Certified Financial Planner Board of Standards, Inc.

Qualification and Educational Requirements

Prerequisites	Candidate must meet the following requirements: <ul style="list-style-type: none">• A bachelor's degree (or higher) from an accredited college or university, and• Three years of full-time personal financial planning experience or the equivalent part-time experience (2,000 hours equals one year full-time).
Education Requirements	Candidate must complete a CFP-board registered program, or hold one of the following: <ul style="list-style-type: none">• CPA• ChFC• Chartered Life Underwriter (CLU)• CFA• Ph.D. in business or economics• Doctor of Business Administration• Attorney's License
Examination Type	Final certification examination
Continuing Education Requirements	30 hours every two years

Enrolled Agent (EA)

Status

Currently offered and recognized by the issuing organization.

Issuing Organization

Internal Revenue Service

Qualification and Educational Requirements

Prerequisites

Pass a background check to ensure that applicant has not engaged in any conduct that would justify the suspension of an enrolled agent from practice before the IRS

Education Requirements

Candidates become an EA by either of the following paths:

- Pass a written exam
- Have accepted IRS experience

Examination Type

IRS Circular 230 contains more detailed information about these two paths
Written exam for path one

Continuing Education Requirements

- 72 hours of continuing education credits over a three-year enrollment period, with a minimum of 16 hours each year
- Six hours of ethics training over a three-year enrollment period

Business Experience

Investment Advisor Representative, Global Retirement Partners, LLC, August 2017 to present
INSTRUCTOR, University of California, Berkeley, Program in Financial Planning, 2013-present
ADJUNCT PROFESSOR, Hult International Business School, 2016-present
FINANCIAL PLANNER, Concentric Wealth Management, Lafayette, CA, 2014-2015
TECHNICAL WRITER AND EDITOR, Hewlett-Packard, 2011-2014

Form ADV Part 2B, Item 3

Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. Heather C. Liston does not have any legal or disciplinary history. Additional information about Heather C. Liston is available on the Securities & Exchange Commission website at www.adviserinfo.sec.gov, and at FINRA broker check at <http://www.finra.org/Investors/ToolsCalculators/BrokerCheck/>

Form ADV Part 2B, Item 4

Other Business Activities

INSTRUCTOR, UNIVERSITY of California, Berkeley, Program in Financial Planning, 2013-present
ADJUNCT PROFESSOR, Hult International Business School, 2016-present

Form ADV Part 2B, Item 5

Additional Compensation

Heather C. Liston does not receive economic benefits from persons other than clients in connection with providing advisory services. "Economic Benefits" includes sales awards and other prizes or any bonus that is based, at least in part, on the number or amount of sales, client referrals, or new accounts.

Heather C. Liston may act as a referral agent to third-party investment advisory firms and she may receive referral compensation from such an arrangement. In such case, you will be provided with disclosure about the arrangement and the compensation to be received at the time of the referral.

Form ADV Part 2B, Item 6

Supervision

Global Retirement Partners, LLC maintains a supervisory structure and system reasonably designed to prevent violations of the Investment Advisers Act of 1940. Cosmo Gould, Chief Compliance Officer or his designee is responsible for administering the firm's policies and procedures for investment advisory activities and for regularly evaluating their effectiveness. Cosmo Gould may be reached at 415-526-2753.

Form ADV Part 2B, Item 7

Requirements for State-Registered Advisers

Global Retirement Partners, LLC is registered with the Securities & Exchange Commission and therefore this section does not apply.
