

Wealth Planners, Inc.

Form ADV, Part II - Disclosure Document

March 2009

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Name of Investment Adviser: Wealth Planners, Inc.				
Address: (Number and Street)	(City)	(State)	(Zip Code)	Area Code: Telephone number:
6230 Perkins Road, Suite B	Baton Rouge	LA	70808	225.757.8007

**This part of Form ADV gives information about the investment adviser and its business for the use of clients.
The information has not been approved or verified by any governmental authority.**

Table of Contents

<u>Item Number</u>	<u>Item</u>	<u>Page</u>
1	Advisory Services and Fees	2
2	Types of Clients	2
3	Types of Investments	3
4	Methods of Analysis, Sources of Information and Investment Strategies	3
5	Education and Business Standards	4
6	Education and Business Background	4
7	Other Business Activities	4
8	Other Financial Industry Activities or Affiliations	4
9	Participation or Interest in Client Transactions	5
10	Conditions for Managing Accounts	5
11	Review of Accounts	5
12	Investment or Brokerage Discretion	6
13	Additional Compensation	6
14	Balance Sheet	6
	Continuation Sheet	Schedule F
	Balance Sheet, if required	Schedule G

(Schedules A, B, C, D, and E are included with Part I of this Form, for the use of regulatory bodies, and are not distributed to clients.)

Potential persons who are to respond to the collection of information contained in this form are not required to respond unless the form displays a currently valid OMB control number.

1. A. Advisory Services and Fees. (check the applicable boxes)

For each type of service provided, state the approximate % of total advisory billings from that service. (See instructions below.)

Applicant:

- | | | | | |
|-------------------------------------|-----|---|-----------|---|
| <input checked="" type="checkbox"/> | (1) | Provides investment supervisory services | <u>80</u> | % |
| <input checked="" type="checkbox"/> | (2) | Manages investment advisory accounts not involving investment supervisory services | <u>10</u> | % |
| <input checked="" type="checkbox"/> | (3) | Furnishes investment advice through consultations not included in either service described above | <u>0</u> | % |
| <input type="checkbox"/> | (4) | Issues periodicals about securities by subscription | | % |
| <input type="checkbox"/> | (5) | Issues special reports about securities not included in any service described above | | % |
| <input type="checkbox"/> | (6) | Issues, not as part of any service described above, any charts, graphs, formulas, or other devices which clients may use to evaluate securities | | % |
| <input checked="" type="checkbox"/> | (7) | On more than an occasional basis, furnishes advice to clients on matters not involving securities | <u>10</u> | % |
| <input type="checkbox"/> | (8) | Provides a timing service | | % |
| <input type="checkbox"/> | (9) | Furnishes advice about securities in any manner not described above | | % |

(Percentages should be based on applicant's last fiscal year. If applicant has not completed its first fiscal year, provide estimates of advisory billings for that year and state that the percentages are estimates.)

- B. Does applicant call any of the services it checked above financial planning or some similar term?
- | | |
|-------------------------------------|--------------------------|
| Yes | No |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> |

C. Applicant offers investment advisory services for: (check all that apply)

- | | | | | | |
|-------------------------------------|-----|--|--------------------------|-----|-----------------------------------|
| <input checked="" type="checkbox"/> | (1) | A percentage of assets under management | <input type="checkbox"/> | (4) | Subscription fees |
| <input type="checkbox"/> | (2) | Hourly charges | <input type="checkbox"/> | (5) | Commissions (Representatives may) |
| <input type="checkbox"/> | (3) | Fixed Fees (not including subscription fees) | <input type="checkbox"/> | (6) | Other |

D. For each checked box in A above, describe on Schedule F:

- the services provided, including the name of any publication or report issued by the adviser on a subscription basis or for a fee
- applicant's basic fee schedule, how fees are charged and whether its fees are negotiable
- when compensation is payable, and if compensation is payable before service is provided, how a client may get a refund or may terminate an investment advisory contract before its expiration date

2. Types of clients - Applicant generally provides investment advice to: (check those that apply)

- | | | | | | |
|-------------------------------------|----|----------------------------------|-------------------------------------|----|---|
| <input checked="" type="checkbox"/> | A. | Individuals | <input checked="" type="checkbox"/> | E. | Trusts, estates, or charitable organizations |
| <input type="checkbox"/> | B. | Banks or thrift institutions | <input checked="" type="checkbox"/> | F. | Corporations or business entities other than those listed above |
| <input type="checkbox"/> | C. | Investment companies | <input type="checkbox"/> | G. | Other (describe on Schedule F) |
| <input checked="" type="checkbox"/> | D. | Pension and profit sharing plans | | | |

Answer all items. Complete amended pages in full, circle amended items and file with execution page (page 1).

3. Types of Investments. Applicant offers advice on the following: (check those that apply)

- | | |
|---|--|
| <input type="checkbox"/> A. Equity securities | <input checked="" type="checkbox"/> H. United States government securities |
| <input checked="" type="checkbox"/> (1) exchange-listed securities | <input type="checkbox"/> I. Options contracts on: |
| <input checked="" type="checkbox"/> (2) securities traded over-the-counter | <input type="checkbox"/> (1) securities |
| <input type="checkbox"/> (3) foreign issuers | <input type="checkbox"/> (2) commodities |
| <input type="checkbox"/> B. Warrants | <input type="checkbox"/> J. Futures contracts on: |
| <input type="checkbox"/> C. Corporate debt securities (other than commercial paper) | <input type="checkbox"/> (1) tangibles |
| <input type="checkbox"/> D. Commercial paper | <input type="checkbox"/> (2) intangibles |
| <input type="checkbox"/> E. Certificates of deposit | <input type="checkbox"/> K. Interests in partnerships investing in: |
| <input checked="" type="checkbox"/> F. Municipal securities | <input type="checkbox"/> (1) real estate |
| <input type="checkbox"/> G. Investment company securities: | <input type="checkbox"/> (2) oil and gas interests |
| <input type="checkbox"/> (1) variable life insurance | <input type="checkbox"/> (3) other (explain on Schedule F) |
| <input checked="" type="checkbox"/> (2) variable annuities | <input type="checkbox"/> L. Other (explain on Schedule F) |
| <input checked="" type="checkbox"/> (3) mutual fund shares | |

4. Methods of Analysis, Sources of Information, and Investment Strategies.

A. Applicant's security analysis methods include: (check those that apply)

- | | |
|---|--|
| (1) <input type="checkbox"/> Charting | (4) <input type="checkbox"/> Cyclical |
| (2) <input checked="" type="checkbox"/> Fundamental | (5) <input type="checkbox"/> Other (explain on Schedule F) |
| (3) <input type="checkbox"/> Technical | |

B. The main sources of information applicant uses include: (check those that apply)

- | | |
|---|---|
| (1) <input checked="" type="checkbox"/> Financial newspapers and magazines | (5) <input type="checkbox"/> Timing services |
| (2) <input checked="" type="checkbox"/> Inspections of corporate activities | (6) <input checked="" type="checkbox"/> Annual reports, prospectuses, filings with the Securities and Exchange Commission |
| (3) <input checked="" type="checkbox"/> Research materials prepared by others | (7) <input type="checkbox"/> Company press releases |
| (4) <input checked="" type="checkbox"/> Corporate rating services | (8) <input type="checkbox"/> Other (explain on Schedule F) |

C. The investment strategies used to implement any investment advice given to clients include: (check those that apply)

- | | |
|---|---|
| (1) <input checked="" type="checkbox"/> Long term purchases (securities held at least a year) | (5) <input type="checkbox"/> Margin transactions |
| (2) <input checked="" type="checkbox"/> Short term purchases (securities sold within a year) | (6) <input type="checkbox"/> Option writing, including covered options, uncovered options or spreading strategies |
| (3) <input type="checkbox"/> Trading (securities sold within 30 days) | (7) <input type="checkbox"/> Other (explain on Schedule F) |
| (4) <input type="checkbox"/> Short sales | |

5. Education and Business Standards.

Are there any general standards of education or business experience that applicant requires of those involved in determining or giving investment advice to clients? Yes No
(If yes, describe these standards on Schedule F.)

6. Education and Business Background.

For:

- each member of the investment committee or group that determines general investment advice to be given to clients, or
- if the applicant has no investment committee or group, each individual who determines general investment advice given to clients (if more than five, respond only for their supervisors)
- each principal executive officer of applicant or each person with similar status or performing similar functions.

On Schedule F, give the:

- name
- year of birth
- formal education after high school
- business background for the preceding five years

7. Other Business Activities. (check those that apply)

- A. Applicant is actively engaged in a business other than giving investment advice.
- B. Applicant sells products or services other than investment advice to clients.
- C. The principal business of applicant or its principal executive officers involves something other than providing investment advice.

(For each checked box describe the other activities, including the time spent on them, on Schedule F.)

8. Other Financial Industry Activities or Affiliations. (check those that apply)

- A. Applicant is registered (or has an application pending) as a securities broker-dealer.
- B. Applicant is registered (or has an application pending) as a futures commission merchant, commodity pool operator or commodity trading adviser.
- C. Applicant has arrangements that are material to its advisory business or its clients with a related person who is a:
 - (1) broker-dealer
 - (2) investment company
 - (3) other investment adviser
 - (4) financial planning firm
 - (5) commodity pool operator, commodity trading advisor or futures commission merchant
 - (6) banking or thrift institution
 - (7) accounting firm
 - (8) law firm
 - (9) insurance company or agency
 - (10) pension consultant
 - (11) real estate broker or dealer
 - (12) entity that creates or packages limited partnerships

(For each checked in box in C, on Schedule F identify the related person and describe the relationship and the arrangements.)

- D. Is applicant or a related person a general partner in any partnership in which clients are solicited to invest? Yes No

(If yes, describe on Schedule F the partnerships and what they invest in.)

9. Participation or Interest in Client Transactions.

Applicant or a related person: (check those that apply)

- A. As principal, buys securities for itself from or sells securities it owns to any client.
- B. As broker or agent effects securities transactions for compensation for any client.
- C. As broker or agent for any person other than a client effects transactions in which client securities are sold to or bought from a brokerage customer.
- D. Recommends to clients that they buy or sell securities or investment products in which the applicant or a related person has some financial interest.
- E. Buys or sells for itself securities that it also recommends to clients.

(For each box checked, describe on Schedule F when the applicant or a related person engages in these transactions and what restrictions, internal procedures, or disclosures are used for conflicts of interest in those transactions.)

Describe on Schedule F, your code of ethic, and state that you will provide a copy of your code of ethics to any client or prospective client upon request.

10. Conditions for Managing Accounts. Does the applicant provide investment supervisory services, manage investment advisory accounts or hold itself out as providing financial planning or some similarly termed services and impose a minimum dollar value of assets or other conditions for starting or maintaining an account?

Yes No

(If yes, describe on Schedule F)

11. Review of Accounts. If applicant provides investment supervisory services, manages investment advisory accounts, or holds itself out as providing financial planning or some similarly termed services:

A. Describe below the reviews and reviewers of the accounts. **For reviews**, include their frequency, different levels, and triggering factors. **For reviewers**, include the number of reviewers, their titles and functions, instructions they receive from applicant on performing reviews, and number of accounts assigned each.

See Schedule F

B. Describe below the nature and frequency of regular reports to clients on their accounts.

See Schedule F

12. Investment or Brokerage Discretion.

- A. Does applicant or any related person have authority to determine, without obtaining specific client consent, the:
- | | | |
|--|-------------------------------------|-------------------------------------|
| | Yes | No |
| (1) securities to be bought or sold? | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | Yes | No |
| (2) amount of the securities to be bought or sold? | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | Yes | No |
| (3) broker or dealer to be used? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| | Yes | No |
| (4) commission rates paid? | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

- B. Does applicant or a related person suggest brokers to clients? Yes No

For each yes answer to A describe on Schedule F any limitations on the authority. For each yes to A(3), A(4) or B, describe on Schedule F the factors considered in selecting brokers and determining the reasonableness of their commissions. If the value of products, research and services given to the applicant or a related person is a factor, describe:

- the products, research and services
- whether clients may pay commissions higher than those obtainable from other brokers in return for those products and services
- whether research is used to service all of applicant's accounts or just those accounts paying for it; and
- any procedures the applicant used during the last fiscal year to direct client transactions to a particular broker in return for product and research services received.

13. Additional Compensation.

Does the applicant or a related person have any arrangements, oral or in writing, where it:

- | | | |
|---|-------------------------------------|--------------------------|
| A. is paid cash by or receives some economic benefit (including commissions, equipment or non-research services) from a non-client in connection with giving advice to clients? | Yes | No |
| | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | Yes | No |
| B. directly or indirectly compensates any person for client referrals? | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

(For each yes, describe the arrangements on Schedule F.)

14. Balance Sheet. Applicant must provide a balance sheet for the most recent fiscal year on Schedule G if applicant:

- has custody of client funds or securities (unless applicant is registered or registering only with the Securities and Exchange Commission); or
 - requires prepayment of more than \$500 in fees per client and 6 or more months in advance
- Has applicant provided a Schedule G balance sheet? Yes No

**Schedule F of
Form ADV**

Continuation Sheet for Form ADV Part II

Applicant: Wealth Planners, Inc.	SEC File Number: 801 – 60269	Date: 03/17/2009
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(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: Wealth Planners, Inc.		IRS Empl. Ident. No.: 72-1475356
Item of Form (identify)	Answer	

Item 1D

ADVISORY SERVICES AND FEES

Wealth Planners, LLC (WPL or the Firm) is an investment adviser and provides investment advisory services to individuals, pension and profit sharing plans, trusts, estates and corporations as described below.

Investment Advisory Services

WPL offers an Investment Advisory Service Program, which is designed to:

- Determine the client's investment objectives, investment time horizon, and risk profile by means of an interview process and in some cases the completion of a questionnaire.
- Set a relevant asset allocation policy for the client.
- Diversify among asset classes and styles.
- Rebalance the client's portfolio. Re-balancing maintains the proper allocation to each asset class in the model.
- Report results.

Compensation - Investment Advisory Services

Portfolio Value	Annual Percentage
Up to \$100,000	1.00%
\$100,000 to \$249,999	0.95%
\$250,000 to \$499,999	0.93%
\$500,000 to \$749,999	0.90%
\$750,000 to \$1,249,999	0.88%
\$1,250,000 to \$1,999,999	0.85%
\$2,000,000 to \$2,999,999	0.71%
\$3,000,000 to \$4,999,999	0.58%
\$5,000,000 to \$9,999,999	0.33%
\$10,000,000 to \$24,999,999	0.25%
Over \$25,000,000	0.16%

All advisory fees will be due and payable monthly in advance on the market value of the account assets including cash under management. Billing is generally made as of the close of business on the last business day of the preceding month. Fees may be lower for accounts invested substantially or entirely in fixed-income investments.

Unless WPL and client agree that particular assets are specifically excluded from client's account(s), fees shall be calculated on the total value of all mutual funds, stocks, bonds, annuities, cash and money market positions held in the client's investment account(s) on the last day of each calendar month based on brokerage account statements.

WPL may absorb, at its discretion, some or all of the transaction fees and commissions related to a client account. Fees absorbed do not include mutual fund management fees and expenses.

**Schedule F of
Form ADV**

Continuation Sheet for Form ADV Part II

Applicant: Wealth Planners, Inc.	SEC File Number: 801 – 60269	Date: 03/17/2009
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(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: Wealth Planners, Inc.		IRS Empl. Ident. No.: 72-1475356
Item of Form (identify)	Answer	

Financial Planning

WPL offers financial planning services to clients for which it provides Investment Advisory Services. WPL generally does not charge a separate fee for financial planning services.

Financial planning services may include a review of all aspects of a client's current financial situation, including the following components: cash management, risk management, insurance, education funding, goal setting, retirement planning, estate and charitable giving planning, tax planning, and capital needs planning. WPL may meet with the client to review risk tolerance, financial goals and objectives, and time horizons and may prepare a written financial plan.

Financial planning services are based on the client's financial situation at the time and are based on financial information disclosed by the client to WPL. Certain assumptions may be made with respect to interest and inflation rates and use of past trends and performance of the market and economy. WPL does not offer any guarantees or promises that client's financial goals and objectives will be met. Clients should notify WPL promptly of any changes to the client's financial goals, objectives or financial situation as such changes may require a review of the plan and changes to recommendations.

Other Services

First Mercantile Trust

For qualified plans, WPL may recommend the services of First Mercantile Trust. First Mercantile Trust offers pooled collective trusts for retirement plans. The pooled collective trusts are held at State Street Bank and are either sub-advised by money managers hired and reviewed by First Mercantile or are invested directly into mutual funds. WPL may assist plan participants in selecting a portfolio that consists of pooled collective trust investments representing various assets classes and manager styles.

First Mercantile Trust also provides model asset allocations for participants based on its capital market research. First Mercantile Trust develops and maintains lifestyle asset allocation portfolios designed to achieve investment goals based on various time horizons and risk tolerances.

Compensation - Other Services

Fees are paid to WPL monthly directly from qualified plan assets as agreed upon by First Mercantile Trust and the Plan Sponsor, similar to a mutual fund annual expense and not in addition to such fee. Fees generally range up to 1.10% annually. Fees are outlined in an agreement between the Plan Sponsor, WPL and First Mercantile and vary depending mainly upon the average account balance per participant eligible for the qualified plan.

General Information On Compensation

WPL's fees and account minimums may be negotiable depending on client's unique situation – such as the size of the aggregate related party portfolio size, family holdings, low cost basis securities, fixed income holdings, or certain passively advised investments and pre-existing relationships with clients. Certain clients may pay more or less than others depending on the amount of assets, type of portfolio, or the time involved, the degree of responsibility assumed, complexity of the engagement, special skills

**Schedule F of
Form ADV**

Continuation Sheet for Form ADV Part II

Applicant: Wealth Planners, Inc.	SEC File Number: 801 – 60269	Date: 03/17/2009
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(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: Wealth Planners, Inc.		IRS Empl. Ident. No.: 72-1475356
Item of Form (identify)	Answer	

needed to solve problems, the application of experience and knowledge of the client's situation.

Fees are not charged based on the capital gains or the capital appreciation of any funds or any part of any funds of any client in a manner prohibited by the Investment Advisors Act of 1940.

Advisory fees charged by WPL are separate and distinct from advisory fees and expenses charged by other investment managers and /or mutual funds in which client assets may be invested. A complete description of these fees and expenses may be found in each mutual fund prospectus.

In addition to WPL account fees, clients may also incur certain charges imposed by third-parties which may include the following: margin interest, mutual fund or money market 12b-1 and sub transfer fees; fund or money market management fees and administrative expenses; certain deferred sales charges on previously purchased mutual funds transferred into the account; IRA and qualified retirement plan fees and other charges required by law; and transaction fees and/or commissions and ticket charges on all securities traded (except as described above).

Custody

The client agreement authorizes WPL to deduct advisory fees directly from the client's account at the custodian. With the exception of the ability to debit client account for advisory fees, WPL does not and will not have custody of clients' funds or securities. Client assets shall be held in the custody of a bank, trust company or brokerage firm agreed upon by the client and WPL.

WPL sends information to the custodian regarding the advisory fees. The custodian sends a statement to the client, at least quarterly, indicating all amounts disbursed from the account including the amount of advisory fees paid directly to WPL. WPL may recommend that certain qualified financial institutions act as custodian and execute securities transactions; however, the client will ultimately be responsible for selection of the financial institution.

Proxy Voting

WPL does not vote proxies for clients, and does not provide advice to clients about how to vote proxies. Clients retain the authority to vote proxies, and will be required to ensure that proxy materials are sent directly to them.

WPL does not render advice to or take any actions on behalf of clients with respect to any legal proceedings, including bankruptcies and shareholder litigation.

Privacy Of Client Information

Clients receive a Privacy Notice when WPL is engaged, and annually thereafter. The Privacy Notice discloses the type of non-public, personal information WPL collects regarding a client, third parties WPL may share the information with and WPL safeguards over client privacy. Clients can obtain a copy of WPL's Privacy Notice by contacting Mr. Dupre' at 225.757.8007.

**Schedule F of
Form ADV**

Continuation Sheet for Form ADV Part II

Applicant: Wealth Planners, Inc.	SEC File Number: 801 – 60269	Date: 03/17/2009
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(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: Wealth Planners, Inc.		IRS Empl. Ident. No.: 72-1475356
Item of Form (identify)	Answer	

Termination

Clients may terminate agreements within five business days after entering into the agreement if Form ADV II was not delivered within 48 hours before contract execution. Thereafter, either party may terminate an agreement upon 30 days written notice. If termination is made after five business days, fees are refundable for any portion of advance fees attributable to services not performed prior to termination of the agreement, and the client is responsible for any fees incurred but not yet billed.

Item 5

EDUCATION AND BUSINESS STANDARDS

WPL requires that each Investment Adviser Representative have an Undergraduate, Masters or Post Graduate degree in a business related field; or certification in one of the following areas: Investment Analysis (CFA, CIMA); Financial Planning (CFP, PFS, etc.); Public Accounting (CPA); or Law (Attorney). Prior related business experience is also a consideration in determining the qualifications of advisor personnel. Investment Adviser Representatives (IARs) must be properly licensed and registered, unless exempted, in states where they are conducting investment advisory business.

Item 6

EDUCATION AND BUSINESS BACKGROUND

Marcel J. Dupre' Born 1967

Business Background:

Wealth Planners, LLC 1999 – Present
President, Chief Compliance Officer
Investment Adviser Representative

Sun America Securities, Inc. 2002 – 2005
Financial Adviser
Registered Principal

London Pacific Securities, Inc. 1997 – 2002
Financial Adviser

Education:

Juris Doctor (Law Degree), Loyola University, New Orleans, LA

Masters in Business Administration, Loyola University, New Orleans, LA

BS/BA in Economics University of Southern Mississippi, Hattiesburg, MS

University of Maryland, Stuttgart, Germany

Embry Riddle University, Stuttgart, Germany

Louisiana State University, Baton Rouge, LA

**Schedule F of
Form ADV**

Continuation Sheet for Form ADV Part II

Applicant: Wealth Planners, Inc.	SEC File Number: 801 – 60269	Date: 03/17/2009
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(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: Wealth Planners, Inc.		IRS Empl. Ident. No.: 72-1475356
Item of Form (identify)	Answer	

Item 7B

OTHER BUSINESS ACTIVITIES

Mr. Dupre' is a licensed insurance agent and offers various insurance products for which he may be paid a commission. He spends approximately 1% of his time offering insurance products.

Item 8C (7)

OTHER FINANCIAL INDUSTRY ACTIVITIES OR AFFILIATIONS (Accounting Firm)

Legier & Materne, APAC, (L&M) an accounting and consulting firm providing audit, compliance, and tax consulting services, owns approximately 24% of WPL through a subsidiary.

L&M may assist clients on accounting and tax matters; and it is understood that L&M may receive separate compensation for these services. Clients are not obligated to utilize L&M's accounting or tax advice; clients are free to utilize any accounting or tax firm.

Item 8C (8)

OTHER FINANCIAL INDUSTRY ACTIVITIES OR AFFILIATIONS (Law Firm)

Mr. Dupre' is an attorney but does not practice law. He does not offer any legal services.

Item 9E

PARTICIPATION OR INTEREST IN CLIENT TRANSACTIONS

WPL and its associated persons may buy or sell securities identical to those recommended to customers for their personal accounts. WPL employees must comply with a Code of Ethics and Statement for Insider Trading. The Code contains provisions reasonably necessary to deter misconduct and conflicts of interest and to detect any violation. The Code's key provisions include: The Code's key provisions include:

- Statement of General Principles
- Policy on Personal Securities Transactions
- Code of Conduct

Any individual not in compliance with the Code of Ethics may be subject to termination.

Clients and prospective clients can obtain a copy of WPL's Code of Ethics by contacting Mr. Dupre' at 225.757.8007.

Item 10

CONDITIONS FOR MANAGING ACCOUNTS

WPL has a minimum account size of \$100,000. Waivers or exceptions from the minimum account size may be granted at the exclusive discretion of WPL.

**Schedule F of
Form ADV**

Continuation Sheet for Form ADV Part II

Applicant: Wealth Planners, Inc.	SEC File Number: 801 – 60269	Date: 03/17/2009
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(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: Wealth Planners, Inc.		IRS Empl. Ident. No.: 72-1475356
Item of Form (identify)	Answer	

**Item 11A and B
REVIEW OF ACCOUNTS**

The day-to-day supervision of the accounts is the responsibility of Mr. Dupre', President. Each investment account is reviewed at least annually for suitability of investments and customer investment objectives. Other factors that would trigger a more frequent review are changes or shifts in the economy, changes in the management and structure of a mutual fund or company in which client assets are invested, and market shifts and corrections or changes in a Client's personal situation.

Clients should notify WPL promptly of any changes to the client's financial goals, objectives or financial situation as such changes may require a review of the portfolio and make recommendations for changes.

Clients will receive detailed monthly or quarterly statements of account activity, holdings and values, as well as confirmations of purchases and sales from qualified, independent custodians.

**Item 12A
INVESTMENT OR BROKERAGE DISCRETION**

WPL generally has the authority to act on a discretionary basis on behalf of clients. When such authority exists between the client and WPL, WPL may choose both the amount and type of publicly traded securities to be bought to satisfy account objectives. This is the case with most of WPL's clients. Additionally, WPL accepts any reasonable limitation or restriction to such authority on the account placed by the client. All limitations and restrictions placed on account must be presented to WPL in writing.

Brokerage Selection and Commissions

Clients are free to select any broker they wish, and are so informed. WPL generally recommends Raymond James Financial Services (RJFS); however, the client will ultimately be responsible for selection of the financial institution. The primary factors considered in WPL's decision to recommend RJFS include financial strength and the quality of the products and services it offers to clients. Specific products and services include quality execution services, consolidated reporting of all assets and Internet access to client accounts. Additionally, WPL receives client information electronically in order to facilitate its review of client accounts.

A client may select a broker other than RJFS if, for example, the client will be receiving investment management consulting services from such Specified Broker where a client directs WPL to effect all transactions for the client's account through a Specified Broker, WPL does not negotiate brokerage commissions with respect to transactions executed by the Specified Broker for the client's account.

Rather, the client and the Specified Broker agree on the commission rate that the Specified Broker will charge for transactions effected for the amount.

As a result, and depending upon (a) the client's arrangement with the Specified Broker, (b) such factors as the number of securities, instruments or obligations being bought or sold for the client, whether round or odd lots are being acquired for the client and the market for the security, instrument

**Schedule F of
Form ADV**

Continuation Sheet for Form ADV Part II

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1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: Wealth Planners, Inc.		IRS Empl. Ident. No.: 72-1475356
Item of Form (identify)	Answer	

or obligation, and (c) the fact that the client will be foregoing any benefit from savings on execution costs that WPL could obtain for its clients through negotiating volume commission discounts on batched transactions, the client may pay higher commissions than those paid by WPL's clients who have not directed WPL to execute transactions through a specified broker or dealer.

In addition, the client may not receive the lowest available price with respect to certain transactions effected for the client's account. In its investment management contracts with clients who have directed WPL to execute transactions through a Specified Broker, WPL generally requires the client to acknowledge the potential for such conflicts of interest. With full disclosure, WPL believes that no conflict of interest that is detrimental to the client will result, since through full disclosure, the clients will have the opportunity to determine what is in their best interests.

Item 12B

INVESTMENT OR BROKERAGE DISCRETION

While WPL may recommend Raymond James Financial Services (RJFS) as executing broker for its clients, WPL does not select brokers for clients.

The commissions charged by brokers are a factor WPL considers in selecting brokers to recommend to clients. WPL assists the client in determining whether his needs require a full service or a discount broker, but does not analyze the reasonableness of commissions for clients who require the services of a broker. Instead, this factor, like the investment philosophy, expertise, resources and personal qualities of the broker, are matters that the client is advised to consider in making a selection after meeting with the various brokers suggested by WPL. Thus, WPL is not in a position to evaluate whether a client might pay a commission higher than that obtainable from other brokers to the broker that the client ultimately selects.

The value of products, research and services given to WPL or a related person is not a factor in selecting brokers to recommend to clients, except to the extent that in dealing with various brokers WPL can evaluate their ability, professionalism and integrity. In this regard, the quality of the products, research and services provided to WPL by brokers may be considered in selecting a list of brokers to suggest to clients. Products, research and services considered include market indices, research reports, analyses of industries and industry segments. WPL, its principals and advisor representatives do not share in any of the commissions, transactions fees or service fees that may be received by any of the brokers used.

Item 13A

ADDITIONAL COMPENSATION

WPL may have the opportunity to receive traditional "non-cash benefits" from RJFS such as customized statements; receipt of duplicate client confirmations and bundled duplicate statements; access to a trading desk servicing RJFS Advisors exclusively; access to block trading which provides the ability to aggregate securities transactions and then allocate the appropriate shares to client accounts; ability to have investment advisory fees deducted directly from client accounts; access to an electronic communication network for client order entry and account information; access to mutual

**Schedule F of
Form ADV**

Continuation Sheet for Form ADV Part II

Applicant: Wealth Planners, Inc.	SEC File Number: 801 – 60269	Date: 03/17/2009
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(Do not use this Schedule as a continuation sheet for Form ADV Part I or any other schedules.)

1. Full name of applicant exactly as stated in Item 1A of Part I of Form ADV: Wealth Planners, Inc.		IRS Empl. Ident. No.: 72-1475356
Item of Form (identify)	Answer	

funds which generally require significantly high minimum initial investments or those that are otherwise only generally available to institutional investors; reporting features; receipt of industry communications; and perhaps discounts on business-related products.

RJFS may also provide general access to research and perhaps discounts on research products. Any research received is used for the benefit of all clients. WPL has no written or verbal arrangements whereby it receives soft dollars. While WPL endeavors at all times to put the interest of the clients first as part of its fiduciary duty, clients should be aware that the receipt of any additional compensation itself creates a conflict of interest, and may affect the judgment of these individuals when making recommendations.

RJFS may also provide general access to research and perhaps discounts on research products. Any research received benefits all clients. WPL has no written or verbal arrangements whereby it receives soft dollars.

Item 13B

ADDITIONAL COMPENSATION

WPL may enter into written arrangements to pay cash referral fees to individuals or companies ("Solicitors") who recommend prospective clients to the Firm. In these cases, there will be a written agreement between WPL and the Solicitors, which clearly defines the duties and responsibilities of the solicitor under this arrangement. In addition, each Solicitor is required to provide a written disclosure document, which explains to the prospective client the terms under which the Solicitor is working with the Firm and the fact that the Solicitor is being compensated for the referral activities. The Solicitor is also required to furnish a copy of the Firm's written disclosure document (Form ADV Part II and this Schedule F) to the prospective client and obtain a written acknowledgement from the client that both the Solicitor's and WPL's disclosure documents have been received.

(End of Schedule F)