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Form ADV Part 2B – Individual Disclosure Brochure

**Erika B. Wood**

Personal CRD Number: 5386781 Investment Adviser Representative

Balefire, LLC  
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This brochure supplement provides information about Erika B. Wood (CRD# 5386781) that supplements the Balefire, LLC ("Balefire") (CRD# 168733) disclosure brochure. You should have received a copy of the Balefire disclosure brochure. Please contact our Chief Compliance Officer at (972) 361-1001 or [compliance@balefirewealth.com](mailto:compliance@balefirewealth.com) if you did not receive a copy of the disclosure brochure or if you have any questions about the contents of the Balefire Disclosure Brochure or this Brochure Supplement.

Additional information about Ms. Wood is available on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching with her full name or Individual CRD#.

## **Item 2: Educational Background and Business Experience**

Born 1985, Erika B. Wood graduated from the University of Minnesota (2007) with a Bachelor of Science degree. She has also earned the Certified Financial Planner designation ("CFP®"), the AIF®-Accredited Investment Fiduciary mark from the Center for Fiduciary Studies, and the RICP®-Retirement Income Certified Professional designation. Her relevant business experience includes Balefire, LLC (2020-Present) and the Principal Financial Group (2007-2020). She has also attained FINRA qualification by successfully completing the Series 6, Series 7, Series 63, and Series 65.

## **Item 3: Disciplinary Information**

Financial Advisors are required to disclose all material facts regarding any legal or disciplinary events that may be material to your evaluation of their integrity with respect to providing you investment advice. Ms. Wood does not have any disclosable legal or disciplinary events. You can find additional information about Erika Wood on the SEC website at <http://www.adviserinfo.sec.gov> and on the FINRA website at [www.finra.org/brokercheck](http://www.finra.org/brokercheck).

## **Item 4: Other Business Activities**

Ms. Wood is a Registered Representative with Lionstreet Financial Services, LLC for the sale of variable insurance contracts and other securities for which Balefire receives commissions and other compensation. She also offers fixed insurance products through unaffiliated issuers for which Balefire receives compensation.

## **Item 5: Additional Compensation**

Your financial advisor does not receive any additional cash compensation, marketing fees, or other financial assistance, beyond the salary, bonuses, and profit-sharing paid to her by Balefire, LLC. Third parties such as issuers, investment managers, and custodians occasionally provide non-cash compensation to Balefire advisors in the form of meals, admission to educational conferences, transportation and lodging, events and entertainment, marketing related expenses, seminars and client appreciation events, and the like that has been approved by Balefire, LLC.

## **Item 6: Supervision**

The Firm's Written Supervisory Procedures (WSPs) govern the activities of all "Supervised Persons" of Balefire, LLC. Supervised Persons are provided with a copy of the WSPs on the date of hire, annually thereafter, and anytime amendments are made. Supervised Persons are required to acknowledge, in writing, receipt of a copy of the WSPs and any amendments thereto promptly after each copy is distributed. The Chief Compliance Officer ("CCO") is responsible for the administration of the compliance program and the written policies and procedures. The CCO may delegate some of his duties to another qualified person of the Firm. The CCO shall remain responsible for ensuring that delegated duties are carried out. Supervised Persons of the Firm include its employees, partners, officers, directors, independent contractors (or other persons occupying a similar status or performing similar functions), as well as any other persons who provide advice on behalf of Balefire and are subject to the Firm's supervision and control. Supervised Persons with supervisory responsibilities, authority, or the ability to influence the conduct of others will exercise reasonable supervision of those subject to their supervision or authority to prevent any violations of applicable statutes, regulations, or provisions of the WSPs. In so doing, Supervised Persons may rely on procedures that are reasonably designed to prevent and detect such violations.