



Fuse Partners, LLC dba VisionPoint Advisory Group
Form ADV Part 2B – Individual Disclosure Brochure
for

James Marshall Mars
Personal CRD Number: 1492554 Investment Adviser Representative

Fuse Partners, LLC dba VisionPoint Advisory Group
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This Form ADV 2B ("Brochure Supplement") provides information about the background and qualifications of James Mars (CRD# 1492554) in addition to the information contained in the VisionPoint Advisory Group ("VisionPoint" or the "Advisor", CRD# 168733) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the VisionPoint Disclosure Brochure or this Brochure Supplement, please contact us at (972) 361-1001.

Additional information about Mr. Mars is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 1492554.

UPDATED: 09/15/2023

Item 2: Educational Background

Name: James Marshall Mars

Born: 1955 Educational Background and Professional Designations: Education:

James Marshall Mars has no formal education after high school.

Designations:

CFP® - Certified Financial Planner

The CERTIFIED FINANCIAL PLANNER™, 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.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;

- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- ii. Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Business Background:

06/2022 – Present Registered Representative
Purshe Kaplan Sterling

09/2013 - Present Investment Adviser Representative
Fuse Partners, LLC dba VisionPoint Advisory Group

10/2013 – 06/2022 Registered Representative
LPL Financial, LLC

04/2011 - Present Owner
VisionPoint Group, LLC

09/2004 - 04/2011 Owner/Principal
Holmes Murphy Financial Services

08/1987 - 09/2013 Registered Representative
Securian Financial Services, Inc

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.

11/30/1998:

Civil Bond
Disposition
Payout
Payout Detail
24,156.64; 11/30/98

8/1/1997:

Customer Dispute
Settled

Allegations

Alleged failure to properly allocate monthly contributions in clients' variable annuity contracts. The amount of damages was \$24,156.64.

Damage Amount Requested

\$24,156.64

Settlement Amount

\$24,156.64

Broker Comment

Adjustments were made to re-allocate each contribution made over the two year period. The total adjustment was \$24,156.64. The settlement in this case was not based on any misconduct by Jim Mars, Minnesota Life, or Ascend Financial Services, Inc. based on obvious differences of opinion, we chose to settle the matter in the benefit of the claimant. this should not be perceived as any admission of fault.

Your financial advisor has disclosable legal or disciplinary events listed above. Information about this event and your financial advisor can be found on BrokerCheck at: <https://brokercheck.finra.org> which is a free tool to help investors research the professional backgrounds of FINRA registered firms and financial advisors.

Item 4: Other Business Activities

James Marshall Mars is a registered representative with Purshe Kaplan Sterling ("PKS"). From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. VisionPoint Group, LLC always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services of any representative of VisionPoint Group, LLC in such individual's outside capacities.

Separate from your financial advisor's relationship with VPAG, your financial advisor engages in other business activities that are not regulated or supervised by VPAG.

The following non-VPAG activities involve at least 10% of your financial advisor's time or represent at least 10% of your financial advisor's income:

The sale of the following products: fixed life insurance, fixed annuities, disability insurance, property and casualty insurance, long-term care insurance, health insurance and/or group benefits. Part ownership of VisionPoint Group, LLC in Dallas, TX.

Your financial advisor is compensated for such activity by the unaffiliated businesses offering such services or by the individuals seeking such services, and not necessarily by VPAG.

Item 5: Additional Compensation

James Marshall Mars is compensated by VPAG as a result of your engaging VPAG to provide investment advisory services to you. The amount of that compensation may be more for some of VPAG's programs than for others, or more than what your financial advisor would earn if you paid separately for services that VPAG may bundle together (e.g. paying separately for investment advice and brokerage services).

Non-Cash Compensation from Third Parties

In connection with the investment advisory services offered by VPAG, certain third parties (e.g. portfolio managers, investment managers, sub-managers, custodians, or

clearing brokers) may provide other non-cash benefits to your financial advisor, such as occasional meals or tickets to sporting or entertainment events. In addition, some of those third parties sponsor or participate in product conferences or training events and, with VPAG's approval, may provide your financial advisor with paid transportation, hotel accommodations and meals for such events.

Marketing & Other Assistance

Third party service providers in some of VPAG's investment advisory programs may provide your financial advisor with additional financial support by reimbursing your financial advisor for certain marketing related expenses, such as client seminars, client appreciation events, and donations to charities or charitable events. In general, such reimbursement or donations create a potential conflict of interest for your financial advisor, but VPAG seeks to limit such conflicts by maintaining policies that monitor the amount of financial support your financial advisor may receive.

For more information about the other compensation and the benefits received by your financial advisor, please contact your financial advisor.

Item 6: Supervision

The Firm's Policies and Procedures ("P&P") govern the activities of all "Supervised Persons" of the Firm. Supervised Persons will be provided with a copy of the P&P on the date of hire, annually and anytime amendments are made. Supervised Persons are required to acknowledge, in writing, receipt of a copy of the P&P 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 the adviser 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 P&P. In so doing, Supervised Persons may rely on

procedures that are reasonably designed to prevent and detect such violations. The Chief Executive Officer is responsible for the general supervision of all Supervised Persons.