Item 1 - Cover Page

BOULEVARD WEALTH MANAGEMENT, INC.
Form ADV 2B – Joe Rapacki, Jr.
REVISED AS OF December 30, 2019

Boulevard Wealth Management, Inc.
6500 City West Parkway #325
Eden Prairie, MN 55344
(877) 664-2583 / (877) 670-2583 Fax
www.boulevardwealth.com

This Brochure provides information about the education, experience and general background of Joseph Rapacki, Jr., CPA/PFS, MST, related to his affiliation with Boulevard Wealth Management, Inc. ("BOULEVARD") as an Investment Advisory Representative (IAR). If you have any questions about the contents of this Brochure, please contact us at (877) 664-2583. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission ("SEC") or by any state securities authority. This information has been filed with each state requiring such information related to BOULEVARD and its IARs.

Additional information about BOULEVARD (CRD No. 164423), Including a copy of its Form ADV Part 1, is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 – Educational Background & Business Experience

EDUCATION

Master of Science in Taxation, University of Hartford

Master of Science in Professional Accounting, University of Harford

RECENT EXPERIENCE

Managing Partner, Rapacki + Co CPAs, Edina, MN (1998 – Present)

Financial Analyst, First Winthop, Boston, MA (1996 – 2000)

Accountant, Filomeno and Company, PC CPAs, Harford, CT (1991 – 1995)

OTHER EXPERIENCE

Member of American Institute of Certified Public Accountants

Member Minnesota Society of Certified Public Accountants

Licensed to practice public accounting in Minnesota, Massachusetts, and North Dakota

The PFS credential is awarded to CPAs who demonstrate the powerful combination of extensive tax expertise and a comprehensive knowledge of financial planning.

A PFS candidate must earn a minimum of 80 hours of personal financial planning education within the five-year period preceding the date of the PFS application. The education must be in the nine areas that make up the PFS Body of Knowledge (personal financial planning process, income tax planning, insurance planning, investment planning, financial independence, employee benefits, performance management, charitable planning, and special needs).

In addition to meeting educational requirements, PFS candidates must:

- Hold a valid CPA license
- Join the AICPA and be a member in good standing
- Have at least two years of full-time experience in personal financial planning within the five-year period preceding the date of the PFS application

CPAs who hold a PFS must adhere to the AICPA code of conduct. You can view that code at:
http://www.aicpa.org/Research/Standards/CodeofConduct/Pages/default.aspx

The comprehensive PFS exam is given during two exam windows annually and lasts for more than seven hours. Alternately, CPAs may satisfy the PFS exam requirement by earning either of the other two major financial planning credentials: CFP® certification or the ChFC® designation.

60 hours of CPE related to the PFP body of knowledge is required.

Non-compliant PFS credential holders may be disciplined up to and including loss of the credential. Disciplinary actions for AICPA are released publicly and may be viewed here: http://www.aicpa.org/ForThePublic/DisciplinaryActions/Pages/default.aspx

Item 3 – Disciplinary Information

None of our advisory representatives has any disciplinary history.

Item 4 – Other Business Activities

Joseph Rapacki, Jr. is a partner in and practicing tax accountant at Rapacki & Co CPAs, providing tax services in Minnesota, North Dakota, and Massachusetts (MN CPA Certificate # 20152). Rapacki & Co CPAs is unrelated to the business of BOULEVARD.

Joseph Rapacki, Jr. is a Life/Health insurance agent [MN Resident Agent License # 40555305, National Insurance Producer Registry (NIPR) # 14872066], and as such may receive commissions for the sale of the following lines of insurance: Life, Disability, and Long-term Care. General activities Include: General Estate Planning, Trust Funding, Business Succession Planning, and Deferred Compensation Structuring.

Item 5 – Additional Compensation

Joseph Rapacki, Jr. is compensated through Boulevard Wealth Management, LLC, acting as a General Life/Health Insurance Agency [MN Resident Agent License # 40555305, National Insurance Producer Registry (NIPR) # 14872066], for the purpose of conducting insurance business in the following product lines: Life Insurance, Disability and Long-term Care. General activities Include: General Estate Planning, Trust Funding, Business Succession Planning, and Deferred Compensation Structuring. Although cases may vary, Joseph Rapacki, Jr. generally receives a 30% commission allocation for insurance casework undertaken for clients of BOULEVARD. Joseph Rapacki, Jr. is also compensated according to his IAR agreement with BOULEVARD.

As an IAR, Joseph Rapacki, Jr. is also eligible for health insurance benefits (where offered), profit-sharing, and reimbursement of certain tuition and other industry-related educational expenses necessary for continuing education and professional development. Other business expenses such as meals/entertainment may be approved according to current firm policies for IARs.

Item 6 – Supervision

Aaron Kolkman is the Designated Compliance Person for BOULEVARD and is therefore responsible for maintaining compliance supervision of the firm and all its Associates, including himself. Aaron Kolkman may be reached directly at (877) 664-2583 ext.201. Joseph Rapacki, Jr. may be reached directly at (877) 664-2583 ext.501.

Item 7 – Requirements for State-Registered Advisers

The State of Minnesota requires a $25,000 surety bond for advisors who have discretionary authority over client accounts, which is the case with BOULEVARD. Discretion means BOULEVARD selects investments for client accounts and conduct trades in client accounts. In addition, the firm must have a supervisory person who has significant industry experience. Aaron Kolkman is BOULEVARD's Designated Compliance Person and may be reached at: (877) 664-2583 ext.201.