

Part 2B of Form ADV: *Brochure Supplement*

Item 1 Cover Page

Part 2B of Form ADV: *Brochure Supplement*

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Information pertaining to:

Donald A. Holyfield, CLU, ChFC
201 Valley Street
Ball Ground, GA 30107
678-454-2818

Sequoyah Planning II, LLC, *Registered Investment Advisor*
CRD #145654

01-01-2011

This brochure supplement provides information about Donald A. Holyfield, CLU, ChFC, Managing Partner provides additional disclosures not listed in Sequoyah Planning's "Part 2A of Form ADV: *Firm Brochure*".

You should have received a copy of that brochure because it is attached to and precedes this supplement. Please contact Donald A. Holyfield, CLU, ChFC if you did not receive Sequoyah Planning's firm brochure or if you have any questions about the contents of this supplement.

Additional information about Donald A. Holyfield, CLU, ChFC is available on the SEC's website at www.adviserinfo.sec.gov.

The following is a chronological list of Mr. Holyfield's education and professional designations.

Formal Education: Donald A. Holyfield Date of Birth: January 21, 1946

- University of Richmond, Virginia. Graduated in 1968 with Bachelor of Science in Business Administration.
- University of Richmond, Virginia. Graduated in 1974 with Master in Commerce.
- The American College, Bryn Mawr, PA. 1975-1977. Graduated in 1977 with a Chartered Life Underwriter (CLU) designation.
- The American College, Bryn Mawr, PA. 1981-1983. Graduated in 1983 with a Chartered Financial Consultant (ChFC) designation.

Business Experience:

- Associate, then Manager for Manulife, Richmond Branch Office, Richmond, Virginia. From March 1972 through August 1980; Manequity. From June, 1978 through August 1980.
- General Agent for Mutual Benefit, Richmond General Agency, Richmond, Virginia. Mutual Benefit Financial Service Company. August 1980 through June 1982.
- Associate General Agent for Principal Financial Group, Charlotte Office, Charlotte, North Carolina. Princor Financial Services Company. June 1982 through September 1987.
- General Agent for Acacia Mutual Charlotte Office, Charlotte, North Carolina. Calvert Securities Corporation. September 1987 through September 1989.
- Associate General Agent for New England Financial Group, Atlanta, General Agency, Atlanta, Georgia. New England Securities. September 1989 through January 2000.
- Manager of Sequoyah Planning, an office of Peachtree Planning, Inc, Woodstock, Georgia. Park Avenue Securities. January 2000 through 2005.

- President of Sequoyah Planning, Managing Partner of Sequoyah Planning II, LLC Woodstock, Georgia (office moved to Ball Ground, Georgia in February 2009). Securities offered through Resource Horizons Group, LLC. September 2005 to present.

Designations:

Donald A. Holyfield, CLU, ChFC, Managing Partner has earned the following designation(s) and is in good standing with the granting authority:

- Chartered Life Underwriter (CLU) granted 1977.

The following is an explanation of the Chartered Life Underwriter (CLU) designation.

The Chartered Life Underwriter designation is earned through successfully completing the following accredited curriculum:

The comprehensive core of CLU® knowledge is supplemented by a broad selection of elective courses, allowing you to customize the program to the dynamics of your individual practice. Complete your program as fast as you like with leading edge texts and access to extensive online study aides at no additional charge, including:

- Supplemental readings
- Online discussion with course professors
- Sample questions
- Practice exams

Fundamentals of Insurance Planning

HS 311

Focuses on the role of planning for insurance needs. Covers basic concepts in risk management and insurance, insurance industry operations, legal principles pertaining to this industry, and regulation of insurers. Examines social insurance, life

insurance and annuities, medical and disability income insurance, long-term care insurance and personal property and liability insurance. Concludes with an overview of commercial property and liability insurance and a case study.

Individual Life Insurance

HS 323

Focuses on life insurance policies and annuities available for the personal needs of individuals and their use in financial planning. Covers individual insurance products and insurance reserves regulation. Also covers insurance company organization, operations and investments.

Life Insurance Law

HS 324

Examines legal rights and obligations of the policy owner and the insurance company, the way disputes between insured's and insurers are resolved and general principles of the judicial process. Covers legal aspects of life insurance, including basic principles of contract law; policy provisions and the incontestable clause; assignments, ownership rights and creditor rights; beneficiary designations and disposition of proceeds; the law of agency; and advertising and privacy issues.

Fundamentals of Estate Planning

HS 330

Covers various aspects of estate and gift tax planning, including the nature, valuation, transfer, administration and taxation of property. Provides a basic understanding of the estate and gift tax system, including strategies of estate planning. Discusses gratuitous transfers of property outright or with trusts, wills and powers of appointment; use of the marital deduction; valuation of assets; and buy-sell agreements. Covers the client interview, fact finding, ethical standards and development of personal estate plans.

Planning for Business Owners and Professionals

HS 331

Focuses on tax and legal aspects of organizing a business; compensation planning for the business owner; business succession planning; buy-sell agreements; estate planning and estate freezing techniques; methods for transferring a family business; lifetime disposition of a business interest

Financial Planning: Process and Environment

HS 300

Provides an overview of the financial planning process, including communication techniques, ethics, risk tolerance, time-value-of-money concepts, financial planning applications, regulatory issues and the legal and economic environment for financial planning. Offers an understanding of the role and responsibilities of a financial planner, along with some analytical skills to aid in financial decision making.

Individual Health Insurance

HS 313

Provides an overview of individual health insurance that is designed to meet the needs of individuals, families and certain business situations. Covers medical expense insurance, disability income insurance and long-term care insurance. Discusses types of policies, contractual provisions, regulation and underwriting. Consumer-directed health plans are also covered.

Income Taxation

HS 321

Examines the federal income tax system with particular reference to the taxation of individuals. Covers such concepts as gross income, exclusions from gross income, deductions, tax credits, capital gains and losses, taxation of life insurance and annuities and income taxation of partners, partnerships, corporations and shareholders.

Group Benefits

HS 325

Analyzes group insurance benefits including the governmental environment, contract provisions, marketing, underwriting, rate making, plan design, cost containment and alternative funding methods. Covers the various private programs related to the economic problems of death, old age and disability. Discusses cafeteria plans, as well as consumer directed health plans, such as HSAs and HRAs.

Planning for Retirement Needs

HS 326

Focuses on selecting the right retirement plan for the business and on individual retirement planning. Covers qualified plans, SEPs, SIMPLEs and 403(b) plans and nonqualified deferred compensation plans. Emphasizes the practical knowledge needed for choosing the best retirement plan, especially for the small business, and designing a plan that will meet a client's needs. Also covers individual retirement planning including IRAs and Roth IRAs, Social Security benefits, saving for retirement and planning for retirement plan distributions.

Investments

HS 328

Covers various aspects of the principles of investments and their application to financial planning. Discusses risk analysis and risk and return computations. Looks

at stocks, bonds, investment companies, options and futures contracts. Includes an extended discussion of tax issues in investing and issues in the practice of portfolio management, including strategic and tactical asset allocation. Provides many examples of ethical and practical issues in managing a client's portfolio.

Fundamentals of Estate Planning

HS 330

Covers various aspects of estate and gift tax planning, including the nature, valuation, transfer, administration and taxation of property. Provides a basic understanding of the estate and gift tax system, including strategies of estate planning. Discusses gratuitous transfers of property outright or with trusts, wills and powers of appointment; use of the marital deduction; valuation of assets; and buy-sell agreements. Covers the client interview, fact finding, ethical standards and development of personal estate plans.

Financial Planning Applications

HS 332

Uses case analysis to integrate planning techniques, tools and products covered in prior courses. Provides practical experience in analyzing and solving realistic financial problems of individuals and businesses. Includes cases that range from simple fact patterns and basic documents to complex situations involving not only personal financial problems, but also financial problems associated with businesses, business ownership and estate planning.

The Financial System in the Economy

HS 322

Presents an overview of the global financial system and its influence on the financial services industry. Examines financial markets, their principal institutions and their economic functions, products and services. Examines the rapidly changing regulatory and competitive environment and major trends that shape the industry.

Fundamentals of Estate Planning

HS 330

Covers various aspects of estate and gift tax planning, including the nature, valuation, transfer, administration and taxation of property. Provides a basic understanding of the estate and gift tax system, including strategies of estate planning. Discusses gratuitous transfers of property outright or with trusts, wills and powers of appointment; use of the marital deduction; valuation of assets; and buy-sell agreements. Covers the client interview, fact finding, ethical standards and development of personal estate plans.

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The Financial System in the Economy

HS 322

Presents an overview of the global financial system and its influence on the financial services industry. Examines financial markets, their principal institutions and their economic functions, products and services. Examines the rapidly changing regulatory and competitive environment and major trends that shape the industry.

Estate Planning Applications

HS 334

Covers estate and gift tax principles with an emphasis on life insurance planning applications. Discusses forecasting the gross estate, life insurance trusts, valuation principles, the use of charitable contributions as an estate planning technique, planning opportunities stemming from the marital relationship, the taxation of trusts, implications of employee benefits and estate freezes. Includes a case study reflecting procedural aspects of estate planning.

Executive Compensation

HS 342

Analyzes the many types of programs used to provide benefits for executives of business firms. Discusses plan design and installation and reviews ERISA, tax and other compliance issues that apply to each type of program. The course includes cash-compensation planning, nonqualified deferred-compensation plans, funded deferred compensation and restricted property plans, stock options, split-dollar life insurance plans, disability income benefits, executive fringe benefits, health reimbursement arrangements and limits on golden parachute payments.

Financial Decisions for Retirement

HS 352

Focuses on financial decisions clients face as they approach, reach and pass retirement age and on the tools and techniques financial advisors may employ to assist their clients with these decisions. The course covers source of income, retirement calculations, investment considerations both during the accumulation and distribution phases, annuities, housing decisions and estate planning concerns. Especially valuable for practitioners helping clients move retirement assets from employer sponsored to individual retirement plans. Provides perspectives on dealing with aging and retired clients and their families.

Item 3 Disciplinary Information

Donald A. Holyfield, CLU, ChFC has no reportable disciplinary history.

Investment-Related Activities: Donald A. Holyfield, CLU, ChFC Managing Partner is not engaged in any other investment related activities.

Donald A. Holyfield, CLU, ChFC does receive commissions or other compensation based on the sale of securities or other investment products, including as a registered representative with Resource Horizons Group, and including distribution or service (trail) fees from mutual funds or other investment products. Page 39 of 42

Item 5 Additional Compensation

Donald A. Holyfield, CLU, ChFC does not receive any economic benefit from any non-advisory client for the provision of advisory services.

Item 6 Supervision

Supervisor: Donald A. Holyfield, CLU, ChFC, Managing Partner.

Title: Managing Partner

Phone Number: 678-454-2818

Supervisory oversight practices are in full compliance with all requirements of all applicable regulatory agencies.

Additional Disciplinary History:

Donald A. Holyfield, CLU, ChFC, Managing Partner has never been found liable in any civil, self-regulatory organization, or administrative proceeding.

Bankruptcy History:

Donald A. Holyfield, CLU, ChFC, Managing Partner has never declared bankruptcy.

End of "Part 2B of Form ADV: *Brochure Supplement*"