

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
March 2021**



**Eugene Delarosa  
(CRD #4909729)**

**Treasure Valley Financial Planning  
1542 S. Timesquare Ln. Ste 102  
Boise, ID 83709**

**Firm Contact:  
Joseph Gates  
Chief Compliance Officer**

**Firm Website Address:  
[www.ClearCreekFM.com](http://www.ClearCreekFM.com)**

This brochure supplement provides information about Mr. Delarosa that supplements Clear Creek Financial Management, LLC dba Treasure Valley Financial Planning's brochure. You should have received a copy of that brochure. Please contact Mr. Gates if you did not receive our firm's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Delarosa is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2: Educational Background & Business Experience

### **Eugene Albert Delarosa**

**Year of Birth:** 1961

#### **Educational Background:**

- 1983: Stanford University; Bachelor of Science in Chemical Engineering

#### **Business Background:**

- 01/2020 – Present Clear Creek Financial Management, LLC dba Treasure Valley Financial Planning; Investment Adviser Representative
- 05/2009 – 01/2020 Ameriprise Financial; Financial Adviser
- 08/2006 – 05/2009 UBS; Financial Adviser
- 02/2005 – 08/2006 Piper Jaffray; Financial Adviser

#### **Exams, Licenses & Other Professional Designations:**

- 2018: Securities Industry Essentials (SIE)
- 2008: Certified Financial Planner (CFP®)
- 2017: Accredited Portfolio Management Advisor (APMA®)
- 2005: Series 7 & 66 Exams

#### **Accredited Portfolio Management Advisor (APMA®):**

Individuals who hold the APMA® designation have completed a course of study encompassing client assessment and suitability, risk/return, investment objectives, bond and equity portfolios, modern portfolio theory and investor psychology. Students have hands-on practice in analyzing investment policy statements, building portfolios, and making asset allocation decisions including sell, hold, and buy decisions within a client's portfolio. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to *Standards of Professional Conduct* and are subject to a disciplinary process. Designees renew their designation every 2 years by completing 16 hours of continuing education, reaffirming adherence to the *Standards of Professional Conduct* and complying with self-disclosure requirements.

#### **Certified Financial Planner (CFP®)**

The CFP® certification is obtained by completing an advanced college-level course of study addressing the financial planning subject areas that the CFP® Board's studies have determined as necessary for the competent and professional delivery of financial planning services, a comprehensive certification exam and agreeing to be bound by the CFP® board's *Standard of Professional Conduct*. As a prerequisite, the individual must have a Bachelor's degree from a regionally accredited United States college or university (or foreign university equivalent) and have at least 3 years of full time financial planning experience (or equivalent measured at 2,000 hours per year). This designation requires 30 hours of continuing education every 2 years and renewing an agreement to be bound by the *Standards of Professional Conduct*.

### Item 3: Disciplinary Information<sup>1</sup>

There are no legal or disciplinary events material to the evaluation of Mr. Delarosa.

### Item 4: Other Business Activities

Mr. Delarosa has no other business activities to disclose.

### Item 5: Additional Compensation

Mr. Delarosa does not receive any other economic benefit for providing advisory services in addition to advisory fees.

### Item 6: Supervision

Mr. Gates, Managing Member and Chief Compliance Officer of Clear Creek Financial Management, LLC, supervises and monitors Mr. Delarosa's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Mr. Gates if you have any questions about Mr. Delarosa's brochure supplement at (360)308-8239.

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<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.