

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



**David Bruce Morrison
(CRD #5463175)**

**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**

This brochure supplement provides information about Mr. Morrison 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. Morrison is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

David Morrison

Year of Birth: 1979

Educational Background:

- 2005: Boise State University; Bachelors in Communication

Business Background:

- 08/2017 – Present Clear Creek Financial Management, LLC dba Treasure Valley Financial Planning; Investment Adviser Representative
- 01/2011 – Present Morrison Asset Management; Managing Member
- 05/2009 – Present Idaho Brewing Company; Managing Member
- 11/2013 – 08/2017 Ameriprise Financial Services; Registered Representative
- 11/2007 – 11/2013 Waddell & Reed Inc.; Registered Representative

Exams, Licenses & Other Professional Designations:

- 2008: Series 66 & 7 Exam
- 2008: Life, Health, and Variable insurance licenses (AK, AZ, CA, FL, IA, ID, ME, MI, MN, MO, MT, NV, NY, NC, OR, UT, & WA)
- Certified Financial Planner (CFP®)

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 Information¹

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

¹ 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.

Item 4: Other Business Activities

Mr. Morrison is a licensed insurance agent/broker. He may offer insurance products and receive fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Mr. Morrison will act in the client's best interest.

Item 5: Additional Compensation

Mr. Morrison 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. Morrison'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. Morrison's brochure supplement at (360)308-8239.