Paul Bae McHugh

Journey Retirement Planning and Investment Management, LLC

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Suite 2
Ammon, ID 83406

Telephone: 208-552-9169

February 19, 2025

FORM ADV PART 2B
BROCHURE SUPPLEMENT

This brochure supplement provides information about Paul Bae McHugh that supplements the Journey Retirement Planning and Investment Management, LLC brochure. You should have received a copy of that brochure. Contact us at 208-552-9169 if you did not receive Journey Retirement Planning and Investment Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Paul Bae McHugh (CRD # 7519662) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Paul Bae McHugh
Year of Birth: 1987
Formal Education After High School:

- Idaho State University, Civil Engineering, Minor Business Management, 8/2009 - 5/2011

Business Background:

- Journey Retirement Planning and Investment Management, LLC, Investment Adviser Representative, 4/2022 - Present
- Journey Retirement Planning & Investment Management, Executive Assistant, 9/2021 - 4/2022
- Porter House Inc, Office Manager & Business Developer, 3/2020 - 9/2021
- Jeff's Family First Insurance Brokerage LLC , Owner/CEO , 4/2019 - 3/2020
- State Farm Insurance - Kevin Allred Agency, Team Member/Producer, 9/2017 - 4/2019
- The Leazer Group, Life Insurance Producer & Field Underwriter , 2/2016 - 9/2017

Item 3 Disciplinary Information

On March 20, 2019 Mr. Mchugh was charged with felony possession of a controlled substance. He pled guilty and his sentence was suspended pending probation. After serving probation and paying a fine, the Court granted issued an Order on February 25, 2022 withdrawing his guilty plea and dismissing the case.

Item 4 Other Business Activities

Paul Bae McHugh is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. McHugh for insurance related activities. This presents a conflict of interest because Mr. McHugh may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. McHugh's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation*, *Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Journey Retirement Planning and Investment Management, LLC's firm brochure for additional disclosures on this topic.

Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Journey Retirement Planning and Investment Management, LLC, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Jennifer Landon, President

Supervisor phone number: 208-552-9169