



Core Planning, LLC.

706 Main Street
O'Fallon, MO 63366
(636) 734-7507

CRD Number: 6658652

August 04, 2026

Danielle Arlotta (CRD # 6658652) - Brochure Supplement (Form ADV Part 2B)

This brochure supplement provides information about Danielle Arlotta that supplements the Core Planning, LLC brochure. You should have received a copy of that Brochure. Please contact Guy Penn at (636) 339-4841 or guy@corepln.com if you did not receive the Brochure or if you have any questions about the contents of this supplement.

Additional information about Danielle Arlotta is available on the SEC's website at www.adviserinfo.sec.gov which can be found using the identification number 6658652.

Danielle Arlotta (CRD# 6658652)

Item 2 - Educational Background and Business Experience

Year of Birth: 1993

Education Background:

2016 – B.S., Financial Planning - William Paterson University

Business Background:

08/2026 – Present: Core Planning LLC; Investment Advisor Rep

01/2022 – 05/2026: Brooklyn Plans LLC; Lead Financial Planner

09/2016 – 08/2021: Financial Planning Concepts of America; Lead Financial Planner

06/2017 – 09/2019: Vanguard; Financial Advisor

05/2016 – 06/2017: Pollack Financial Group; Paraplanner

Examinations/Professional Designations:

Certified Financial Planner (CFP®)

I am certified to offer financial planning services in the United States by the Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and the CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.CFP.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards").

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified:

Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning.

Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 - Disciplinary Information:

Danielle Arlotta has not been subject to criminal or civil actions, administrative proceedings, self-regulatory organization (SRO) proceedings, revocations, or suspensions.

Item 4 - Other Business Activities:

Danielle Arlotta has no reportable outside business activities.

Item 5 - Additional Compensation:

Danielle Arlotta does not receive economic benefits for providing advisory services from anyone who is not a Core Planning client.

Item 6 - Supervision:

Danielle Arlotta, as an Investment Advisor Representative of Core Planning, is supervised by the Chief Compliance Officer. Any questions regarding supervision or compliance practices may be directed to the Chief Compliance Officer, Guy Penn, at 636-339-4841.