

Steven Schwefel

Geneva Partners, LLC

772 West Main Street
Suite 301
Lake Geneva, Wisconsin 53147

Telephone: 262-248-1350
Email: schwefel@genevapartnersllc.com
Web Address: www.genevapartnersllc.com

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Steven Schwefel that supplements Geneva Partners, LLC's disclosure brochure. You should have received a copy of that brochure. Please contact Steven Schwefel, Managing Member of Geneva Partners, LLC at schwefel@genevapartnersllc.com if you did not receive the disclosure brochure or if you have any questions about the contents of this supplement.

Additional information about Steven Schwefel is available on the SEC's website at www.adviserinfo.sec.gov.

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Educational Background and Business Experience

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Steven Schwefel is the sole owner and Managing Member of Geneva Partners, LLC ("Geneva Partners"). Mr. Schwefel has owned Geneva Partners since March of 2003, and his education and business background includes the following:

Year of Birth: 1959

Post-Secondary Education:

University of Illinois – Champaign, Bachelor of Arts in Economics (1982)
Northwestern University, Master of Business Administration (2003)

Business Background:

From January of 2003 until April of 2004, Mr. Schwefel was an investment adviser representative for Certes Capital Wealth Management, LLC, and was an investment adviser representative for QA3 Financial, LLC from May of 2002 until December of 2003. Both of these companies are based in Deerfield, Illinois. Mr. Schwefel has owned Geneva Partners, based out of Lake Geneva, Wisconsin, since March of 2003 and has been employed at WRP Investments, Inc. for the same period of time.

Certifications:

Series 63 License, Uniform Securities State Law Examination, 12/03/1984
Series 65 License, Uniform Investment Adviser Law Examination, 10/14/1992

The Uniform Securities Agent State Law Examination (Series 63) is designed to qualify candidates as securities agents and covers the principles of state securities regulation reflected in the Uniform Securities Act. Candidates must pass a 60 question examination with a score of at least 72% in order to receive a Series 63 License. The Uniform Investment Adviser Law Examination (Series 65) is designed to qualify candidates as investment adviser representatives in a three hour long test spanning 130 questions. Candidates must pass with at least a 72% in order to receive a Series 65 License.

Disciplinary Information

Steven Schwefel does not have any legal or disciplinary events to disclose.

Form ADV Part 2B, Item 3

Other Business Activities

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In addition to his role as Managing Member of Geneva Partners, Mr. Schwefel is a registered representative of a registered broker-dealer. As such, he may receive usual and ordinary compensation for securities transactions. However, Mr. Schwefel receives no compensation from any advisory client transactions. Geneva Partners endeavors at all times to put the interest of its clients first as part of our fiduciary duty as a registered investment adviser; we take the following steps to address this conflict:

- ☐ we disclose to clients the existence of all material conflicts of interest, including the potential for our firm and our employees to earn compensation from advisory clients in addition to our firm's advisory fees;
- ☐ we disclose to clients that they are not obligated to purchase recommended investment products from our employees or affiliated companies;
- ☐ we collect, maintain and document accurate, complete and relevant client background information, including the client's financial goals, objectives and risk tolerance;
- ☐ our firm's management conducts regular reviews of each client account to verify that all recommendations made to a client are suitable to the client's needs and circumstances;
- ☐ we require that our employees seek prior approval of any outside employment activity so that we may ensure that any conflicts of interests in such activities are properly addressed;
- ☐ we periodically monitor these outside employment activities to verify that any conflicts of interest continue to be properly addressed by our firm; and
- ☐ we educate our employees regarding the responsibilities of a fiduciary, including the need for having a reasonable and independent basis for the investment advice provided to clients.

Additional Compensation

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In addition to his role as Managing Member of Geneva Partners, Mr. Schwefel is a registered representative of a registered broker-dealer. As such, he may receive usual and ordinary compensation for securities transactions

Supervision

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Mr. Schwefel is the Managing Member and Chief Compliance Officer of Geneva Partners and is responsible for supervising the advisory activities of the firm's employees.

Geneva Partners has also adopted policies and procedures to prevent the misuse of "insider" information (material, non-public information). A copy of such policies and procedures is available to any person upon request. Geneva Partners monitors client portfolios as part of an ongoing process while regular account reviews are conducted on at least an annual basis. All investment advisory clients are encouraged to discuss their needs, goals and objectives with the Geneva Partners and to keep the Geneva Partners informed of any changes. Geneva Partners periodically contacts ongoing investment advisory clients at least annually to review its previous services and/or recommendations and to discuss the impact resulting from any changes in the client's financial situation and/or investment objectives.

Requirements for State-Registered Advisers

Form ADV Part 2B, Item 7

Mr. Schwefel has not been found liable in any arbitration or civil claim awards. Furthermore, Mr. Schwefel has not been the subject of a bankruptcy petition.