

## FORM ADV PART 2B BROCHURE SUPPLEMENT

**Stephanie D. Williams**

### **Item 1 – Cover Page**

Stephanie D. Williams  
Sequent Planning, LLC  
8420 West Dodge Road, Suite 110  
Omaha, NE 68114

Located at:  
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**This brochure supplement provides information about Stephanie Denise Williams that supplements the Sequent Planning, LLC (“Sequent”) disclosure brochure. You should have received a copy of that brochure. Please contact Mike Chochon at 402-953-3544 or at [mike@sequentplanning.com](mailto:mike@sequentplanning.com) if you did not receive Sequent’s brochure or if you have any questions about the contents of this supplement.**

**Additional information about Stephanie Denise Williams is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

### **Item 2 – Educational Background and Business Experience**

#### **Stephanie Denise Williams**

Born: 1958  
CRD #2137997

#### ***Post Secondary Educational Background:***

America College, Studying Retirement Income Management: Started Attending in 06/2015

#### ***Business Background:***

Sequent Planning, LLC, Investment Adviser Representative, 07/2018 to Present;  
Futuraity First Insurance Group, Insurance Agent, 04/2018 to Present  
Mutual of Omaha Investor Services, Registered Representative, 01/2015 to 06/2018;  
Mutual of Omaha Insurance Company, Insurance Agent, 06/2014 to 06/2018;  
Susquehanna Wealth Strategies, Financial Consultant, 12/2010 to 11/2013;  
Cetera Investment Services LLC, Financial Consultant, 12/2010 to 11/2013  
Edward Jones, Financial Adviser, 11/2008 to 11/2010  
Cannon Financial Services, Inc., Manager, Asset Management, 04/1993 to 11/2008.

### **Item 3 – Disciplinary Information**

Stephanie Williams has no disciplinary information to disclose in this brochure.

### **Item 4 – Other Business Activities**

#### **Insurance Agent**

Stephanie Williams is independently licensed to sell insurance and annuity products through various insurance companies. When acting in this capacity, Stephanie Williams will receive commissions for selling insurance and annuity products.

Stephanie Williams may also receive other incentive awards for the recommendation/sale of annuities and other insurance products. The receipt of compensation and other incentive benefits may affect the judgment of Stephanie Williams when recommending products to her clients. While Stephanie endeavors at all times to put the interest of her clients first as a part of Sequent's overall fiduciary duty to clients, clients should be aware that the receipt of commissions and additional compensation itself creates a conflict of interest and may affect Stephanie's decision-making process when making recommendations.

Clients are never obligated or required to purchase insurance products from or through Stephanie Williams and may choose any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

### **Item 5 – Additional Compensation**

In addition to the description of additional compensation provided in Item 4, Stephanie Williams can receive additional benefits.

Certain product sponsors may provide Stephanie Williams with other economic benefits as a result of her recommendation or sale of the product sponsors' investments. The economic benefits received by Stephanie Williams from product sponsors can include but are not limited to, financial assistance or the sponsorship of conferences and educational sessions, marketing support, incentive awards, payment of travel expenses, and tools to assist Stephanie Williams in providing various services to clients.

Although Sequent and Stephanie Williams endeavor at all times to put the interest of its clients ahead of its own or those of its officers, directors, or representatives ("affiliated persons"), these arrangements could affect the judgment of Stephanie Williams when recommending investment products. These situations present a conflict of interest that may affect the judgment of affiliated persons including Stephanie Williams.

### **Item 6 – Supervision**

Mike Chochon is the Chief Compliance Officer of Sequent. He is responsible for overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives, including Stephanie Williams. Mike Chochon can be contacted at 402-953-3544.

**Item 7 – Requirements for State-Registered Advisers**

Stephanie Williams has not been involved in an arbitration award and has not been found liable in an arbitration claim alleging damages in excess of \$2,500. She has not been involved in any award or found liable in any civil, self-regulatory organization, or administrative proceeding.

Stephanie Williams filed Chapter 7 bankruptcy in November 2014. The bankruptcy was discharged in February 2015.