



7855 S. River Parkway  
Suite 206  
Tempe, AZ 85284

(480) 550-6556

**Form ADV Part 2B  
Brochure Supplement  
for  
Lane Martinsen**

Date of Brochure: December 9, 2024

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This brochure supplement provides information about Lane Martinsen that supplements MartinSEN Wealth Management, LLC's ("MWM" or the "Firm") ADV 2A brochure. You should have received a copy of that brochure. Please contact our compliance department at (480) 550-6556 if you did not get a copy of MWM's brochure or if you have any questions about the contents of this supplement.

Additional information about Lane Martinsen (CRD#: 6435057) is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 – Educational Background and Business Experience

Name: Lane Martinsen

Year of Birth: 1964

Education: University of Phoenix, Bachelor of Science in Business Administration, 1997  
The University of Arizona, CFP® Certification Education Courses, 2023

- CFP® Board exam has not yet been taken.

Professional  
Designation  
Completed:

**Retirement Income Certified Professional™ (“RICP®”) – Since 2016**

The RICP® designation teaches advisers techniques and best practices used to create sustainable streams of retirement income. The education covers retirement income planning, maximizing Social Security and other income sources, minimizing risks to the plan, and managing portfolios during the asset distribution phase. The designation includes three required, college-level courses that represent a total average study time of more than 150 hours. RICP® designees must meet experience, continuing education and, ethics requirements. The credential is awarded by The American College, a non-profit educator with an 85-year heritage and the highest form of academic accreditation.

**Certified Long-Term Care™ (“CLTC®”) – Since 2020**

The CLTC®, Certified in Long-Term Care™ designation, is a long-term care planning designation granted by the Corporation for Long-term Care™ Certification to individuals who satisfy educational, work experience, and ethics requirements. Recipients of the CLTC® have completed a rigorous multidisciplinary course and examination that focuses on long-term care. To maintain this designation, the CLTC® must satisfy continuing education requirements and adhere to the CLTC® Code of Professional Responsibility.

**National Social Security Advisor Certificate (“NSSA®”)**

The NSSA® designation’s purpose is to recognize advanced education, knowledge and training in the Social Security programs of the United States. After completing the training and passing an examination, the designation also requires 8 hours of continuing education every 2 years.

Business

Background: Martinsen Wealth Management, LLC  
Investment Adviser Representative, 08/2024 - Present

First Advisors National  
Vice President, 01/2015 – Present

Money Park, Inc.  
CEO, 06/1999 – 01/2015

## Item 3 – Disciplinary Information

Mr. Martinsen has no civil, criminal, administrative or regulatory events to report. Additional information regarding Mr. Martinsen’s registration as an Investment Adviser Representative may be found by accessing

the SEC's public disclosure website at <https://www.adviserinfo.sec.gov>.

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

MWM also acts as an insurance agency and offers our advisory clients insurance products on a commission-basis. Lane Martinsen is a licensed insurance agent affiliated with our insurance agency. During your financial planning process, you may choose to work with your financial professional in both their capacity as an investment adviser representative of MWM, as well as in their capacity as an insurance agent. As such, your financial professional, in their dual capacity as an IAR and insurance agent, may advise you to purchase insurance products (general disability insurance, life insurance, annuities, and other insurance products to you), and then assist you in implementing the recommendations by selling you those same products through our affiliated insurance agency.

Although MWM and its investment adviser representatives owe you a fiduciary duty, it should be noted that the receipt of a commission by the financial professional and our insurance agency provides a variety of incentives to recommend these products. For example, Lane Martinsen and the insurance agency will earn a larger commission the more assets are invested in an annuity, therefore they are economically incentivized to recommend that you purchase an annuity over placing those assets in a brokerage or advisory account, which may provide lower total compensation. Our financial professional and insurance agency could also be incentivized to recommend a product that pays a commission now, versus an advisory product that pays fees over a longer period. As an example, all other variables held equal, a 5% commission paid by an insurance company upon sale of a \$100,000 annuity product, may be more attractive to a financial professional than a one percent (1%) advisory fee charged on a \$100,000 account paid over a period of five (5) years, despite the overall pre-tax compensation paid to the financial professional being equal. Note that some products pay a higher street or bonus commission than others, increasing this incentive and creating an economic incentive to favor higher fee-paying products.

In exchange for selling you insurance products, Lane Martinsen and our insurance agency may also receive additional compensation or incentives in the form of bonus commissions, gifts, meals or entertainment, reimbursement for training, marketing, education, advertising, or travel expenses associated with sponsored conferences or events. The exact compensation cannot be accurately calculated at the time of recommendation because they rely on sales goals, but you should be aware that there are a variety of forms of indirect compensation paid by carriers and insurance marketing organizations, and this compensation creates a conflict of interest.

You should be aware you have the option to implement any insurance recommendations through outside insurance brokers or agents. You are in no way required to implement any insurance product recommendations through your MWM representative in their capacity as a licensed insurance agent.

Lane Martinsen is also an investment advisor representative for First Advisers National. Mr. Martinsen is an independent contractor and spends roughly 50% of his time working with FAN clients.

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

Mr. Martinsen does not receive any additional compensation other than what is listed in the above sections.

#### **Item 6 – Supervision**

Jeremy Vaught is the Firm's Chief Compliance Officer who also supervises all activities of the Firm including Lane Martinsen. Mr. Vaught's contact information is [jeremy@martinsenwealth.com](mailto:jeremy@martinsenwealth.com) or (480) 550-6556. Mr. Martinsen adheres to all applicable regulatory requirements, together with all policies and procedures outlined in the Firm's code of ethics and compliance manual.

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

Lane Martinsen has no reportable events to disclose.



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**Form ADV Part 2B  
Brochure Supplement  
for  
Jeremy Vaught**

Date of Brochure: December 9, 2024

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Additional information about Jeremy Vaught (CRD#: 6618086) is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 – Educational Background and Business Experience

Name: Jeremy Vaught

Year of Birth: 1983

Education: New Mexico State University, MBA – Finance Specialist, 2013  
New Mexico State University, BBA – Marketing; Minor in Advertising, 2011  
Lake Land College, Associates of Science in Marketing, 2010

Professional  
Designation  
Completed:

**CFP® - Certified Financial Planner**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;

Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;

Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and

Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- i. Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and

- ii. Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

#### Business

Background: Martinsen Wealth Management, LLC  
Investment Adviser Representative, 08/2024 - Present

First Advisors National  
Investment Adviser Representative, 02/2024 – 10/2024

The Prudential Insurance Company of America  
Financial Planner, 11/2022 – 02/2024

Pruco Securities, LLC  
Registered Representative, 11/2022 – 01/2024

Ameriprise Financial Services, Inc.  
Registered Representative, 03/20169 – 11/2022

Unemployed  
Unemployed, 08/2015 – 03/2016

WestStar Bank  
Trust and Investment Associate, 09/2014 – 08/2015  
Business Loan Analyst, 08/2013 – 09/2014

### Item 3 – Disciplinary Information

Investment Adviser Representatives are required to disclose material facts regarding any legal or disciplinary events. Mr. Vaught has reportable legal or disciplinary events. Additional information regarding Mr. Vaught's registration as an Investment Adviser Representative may be found by accessing the SEC's public disclosure website at <https://www.adviserinfo.sec.gov>.

### Item 4 – Other Business Activities

MWM also acts as an insurance agency and offers our advisory clients insurance products on a commission-basis. Jeremy Vaught is a licensed insurance agent affiliated with our insurance agency. During your financial planning process, you may choose to work with your financial professional in both their capacity as an investment adviser representative of MWM, as well as in their capacity as an insurance agent. As such, your financial professional, in their dual capacity as an IAR and insurance agent, may advise you to purchase insurance products (general disability insurance, life insurance, annuities, and other insurance products to you), and then assist you in implementing the recommendations by selling you those same products through our affiliated insurance agency.

Although MWM and its investment adviser representatives owe you a fiduciary duty, it should be noted that the receipt of a commission by the financial professional and our insurance agency provides a variety of incentives to recommend these products. For example, Jeremy Vaught and the insurance agency will earn a larger commission the more assets are invested in an annuity, therefore they are economically incentivized to recommend that you purchase an annuity over placing those assets in a brokerage or advisory account, which may provide lower total compensation. Our financial professional and insurance agency could also be incentivized to recommend a product that pays a commission now, versus an advisory product that pays fees over a longer period. As an example, all other variables held equal, a 5% commission paid by an insurance company upon sale of a \$100,000 annuity product, may be more attractive to a financial professional than a one percent (1%) advisory fee charged on a \$100,000 account paid over a period of five (5) years, despite the overall pre-tax compensation paid to the financial professional being equal. Note that some products pay a higher street or bonus commission than others, increasing this incentive and creating an economic incentive to favor higher fee-paying products.

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You should be aware you have the option to implement any insurance recommendations through outside insurance brokers or agents. You are in no way required to implement any insurance product recommendations through your MWM representative in their capacity as a licensed insurance agent.

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

Mr. Vaught does not receive any additional compensation other than what is listed in the above sections.

#### **Item 6 – Supervision**

Jeremy Vaught is the Firm's Chief Compliance Officer who also supervises all activities of the Firm. Lane Martinsen, acting as Founder and CEO supervises Mr. Vaught's activities. Mr. Martinsen's contact information is [lane@martinsenwealth.com](mailto:lane@martinsenwealth.com) or (480) 550-6556. Mr. Vaught adheres to all applicable regulatory requirements, together with all policies and procedures outlined in the Firm's code of ethics and compliance manual.

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

Jeremy Vaught filed an offer in compromise on February 6, 2015. Mr. Vaught the compromise was satisfied on April 2, 2015.





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**Form ADV Part 2B  
Brochure Supplement  
for  
Kenneth Holmes**

Date of Brochure: December 9, 2024

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Additional information about Kenneth Holmes (CRD#: 5652653) is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Name: Kenneth Holmes

Year of Birth: 1977

Education: No post-secondary education to report.

### **Business**

Background: Martinsen Wealth Management, LLC  
Investment Adviser Representative, 08/2024 - Present

Walter Homes CLU Inc DBA Holmes Financial Services  
President/Owner, 06/2009 – Present

First Advisors National, LLC  
Investment Adviser Representative, 11/2021 – Present

FSC Securities Corporation  
Financial Advisor, 07/2009 – 10/2021

## **Item 3 – Disciplinary Information**

Mr. Holmes has no civil, criminal, administrative or regulatory events to report. Additional information regarding Mr. Martinsen's registration as an Investment Adviser Representative may be found by accessing the SEC's public disclosure website at <https://www.adviserinfo.sec.gov>.

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

Mr. Holmes engages in the following Outside Business Activities:

H&H Holding, LLC – Mr. Holmes is the owner of this company where the primary business purpose is renting offices to lessees of the building.

Wish for our Heros – Mr. Holmes is a volunteer for this charity which the stated goal is to help active military duty families fight hardships.

Walter Homes CLU, Inc DBA Homes Financial Services – Mr. Holmes is the Owner of this company which serves clients by providing insurance products, Fixed Annuity business and collection of trust data for Trusts to be drawn for clients. By Mr. Holmes acting in this capacity, there may be a conflict of interest. No client of MWM is under any obligation to utilize these services.

MWM also acts as an insurance agency and offers our advisory clients insurance products on a commission-basis. Mr. Holmes is a licensed insurance agent affiliated with our insurance agency. During your financial planning process, you may choose to work with your financial professional in both their capacity as an investment adviser representative of MWM, as well as in their capacity as an insurance agent. As such, your financial professional, in their dual capacity as an IAR and insurance agent, may

advise you to purchase insurance products (general disability insurance, life insurance, annuities, and other insurance products to you), and then assist you in implementing the recommendations by selling you those same products through our affiliated insurance agency.

Although MWM and its investment adviser representatives owe you a fiduciary duty, it should be noted that the receipt of a commission by the financial professional and our insurance agency provides a variety of incentives to recommend these products. For example, Kenneth Holmes and the insurance agency will earn a larger commission the more assets are invested in an annuity, therefore they are economically incentivized to recommend that you purchase an annuity over placing those assets in a brokerage or advisory account, which may provide lower total compensation. Our financial professional and insurance agency could also be incentivized to recommend a product that pays a commission now, versus an advisory product that pays fees over a longer period. As an example, all other variables held equal, a 5% commission paid by an insurance company upon sale of a \$100,000 annuity product, may be more attractive to a financial professional than a one percent (1%) advisory fee charged on a \$100,000 account paid over a period of five (5) years, despite the overall pre-tax compensation paid to the financial professional being equal. Note that some products pay a higher street or bonus commission than others, increasing this incentive and creating an economic incentive to favor higher fee-paying products.

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You should be aware you have the option to implement any insurance recommendations through outside insurance brokers or agents. You are in no way required to implement any insurance product recommendations through your MWM representative in their capacity as a licensed insurance agent.

Kenneth Holmes is also an investment advisor representative for First Advisers National. Mr. Holmes is an independent contractor and spends roughly 50% of his time working with FAN clients.

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

Mr. Holmes does not receive any additional compensation other than what is listed in the above sections.

#### **Item 6 – Supervision**

Jeremy Vaught is the Firm's Chief Compliance Officer who also supervises all activities of the Firm including Mr. Holmes. Mr. Vaught's contact information is [jeremy@martinsenwealth.com](mailto:jeremy@martinsenwealth.com) or (480) 550-6556. Mr. Holmes adheres to all applicable regulatory requirements, together with all policies and procedures outlined in the Firm's code of ethics and compliance manual.

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

Kenneth Holmes has no reportable events to disclose.



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Additional information about Mark Goaslind (CRD#: 5724991) is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Name: Mark Goaslind

Year of Birth: 1959

Education: Brigham Young University, Bachelor of Science in Business Management – Finance Emphasis, 1996

Business Background:

- Martinsen Wealth Management, LLC  
Investment Adviser Representative, 08/2024 - Present
- Church of Jesus Christ of Latter-Day Saints  
Manager, 06/2012 – Present
- Ohio National Financial Services  
PGA Agent, 07/2010 – Present
- Springwater Capital, LLC  
Loan Officer, 12/2009 – Present
- American United Life  
Agent, 09/2009 – Present
- First Advisors National  
Investment Adviser Representative, 06/2023 – 09/2024
- The O.N. Equity Sales Company  
Registered Representative, 10/2011 – 05/2023

## **Item 3 – Disciplinary Information**

Mr. Goaslind has no civil, criminal, administrative or regulatory events to report. Additional information regarding Mr. Martinsen's registration as an Investment Adviser Representative may be found by accessing the SEC's public disclosure website at <https://www.adviserinfo.sec.gov>.

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

Mr. Goaslind engages in the other outside business activity listed below:

Mr. Goaslind is the Owner of Abacus Partners, LLC which is a pass through entity that exists for managing business expenses.

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agent. As such, your financial professional, in their dual capacity as an IAR and insurance agent, may advise you to purchase insurance products (general disability insurance, life insurance, annuities, and other insurance products to you), and then assist you in implementing the recommendations by selling you those same products through our affiliated insurance agency.

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In exchange for selling you insurance products, Mark Goaslind and our insurance agency may also receive additional compensation or incentives in the form of bonus commissions, gifts, meals or entertainment, reimbursement for training, marketing, education, advertising, or travel expenses associated with sponsored conferences or events. The exact compensation cannot be accurately calculated at the time of recommendation because they rely on sales goals, but you should be aware that there are a variety of forms of indirect compensation paid by carriers and insurance marketing organizations, and this compensation creates a conflict of interest.

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

Mr. Goaslind does not receive any additional compensation other than what is listed in the above sections.

#### **Item 6 – Supervision**

Jeremy Vaught is the Firm's Chief Compliance Officer who also supervises all activities of the Firm including Mark Goaslind. Mr. Vaught's contact information is [jeremy@martinsenwealth.com](mailto:jeremy@martinsenwealth.com) or (480) 550-6556. Mr. Goaslind adheres to all applicable regulatory requirements, together with all policies and procedures outlined in the Firm's code of ethics and compliance manual.

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

Mark Goaslind has no reportable events to disclose.



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Additional information about William Goaslind (CRD#: 7573086) is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Name: William Goaslind

Year of Birth: 1995

Education: Utah Valley University, Bachelor of Science in Finance, 2022

Business  
Background: Martinsen Wealth Management, LLC  
Investment Adviser Representative, 08/2024 - Present

First Advisors National  
Associate Financial Planner, 08/2022 – 10/2024

Blue Cloud Pediatric Surgeries  
Intern, 05/2021 – 01/2022

Utah Valley University  
Student, 05/2019 – 05/2021

Nexeo HR  
HR Assistant, 05/2018 – 05/2019

US Senate  
Intern, 01/2018 – 05/2018

Salt Lake Community College  
Student, 01/2017 – 01/2018

LDS Church  
Missionary, 10/2014 – 12/2016

## **Item 3 – Disciplinary Information**

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

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