



HAROLD DANCE INVESTMENTS

Financial Advisors Since 1959

Brochure Supplement

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Aaron J. Neeley
Daniel J. Neeley
Jack W. Peterson
Kent Haueter
Kristilyn Wilkinson
Patty S. Bartholomew
Stephen F. Neeley

Harold Dance Investments
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435-752-8484

Disclaimer

This brochure provides information about Aaron J. Neeley, Daniel J. Neeley, Jack W. Peterson, Kent Haueter, KristiLyn Wilkinson, Patty S. Bartholomew, and Stephen F. Neeley who serve as Investment Advisor Representatives (hereafter “IAR”) of Harold Dance Investments (hereafter “HDI”). This document supplements the Firm Disclosure Brochure. You should have received a copy of that brochure. If you did not receive a copy of the HDI brochure or if you have any questions about the contents of this supplement, please contact Stephen F. Neeley, President and Chief Compliance Officer of HDI at 435-752-8484 or steve@harolddance.com. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission (hereinafter “SEC”) or by any state securities authority.

Additional information about the above referenced individuals is available on the SEC’s website at www.adviserinfo.sec.gov. In using the website, it may be helpful to reference the following CRD numbers:

<i>Name</i>	<i>CRD Number</i>
Aaron J. Neeley	6001558
Daniel J. Neeley	5556337
Jack W. Peterson	3110933
Kent Haueter	843840
KristiLyn Wilkinson	7488891
Patty S. Bartholomew	7086050
Stephen F. Neeley	3235100

Educational Background and Business Experience

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Aaron J. Neeley – *Year of Birth:* 1986 – *Formal Education After High School:* Bachelor of Science in Finance and Bachelor of Science in Economics, Utah State University, 2011, Master of Science in Financial Planning &

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Consumer Economics, University of Georgia, 2019. *Business Background for the Preceding Five Years:* Financial Advisor, HDI, 2015-Present.

Daniel J. Neeley – *Year of Birth:* 1982 – *Formal Education After High School:* Bachelor of Science, Utah State University, 2006, Master of Accountancy, Utah State University, 2007. *Business Background for the Preceding Five Years:* Financial Advisor, HDI, 2008-Present.

Jack W. Peterson – *Year of Birth:* 1951 – *Formal Education After High School:* Bachelor of Science, Utah State University, 1975, Master of Business Administration, Utah State University, 1976. *Business Background for the Preceding Five Years:* Financial Advisor, HDI, 2009-Present.

Kent B Haueter – *Year of Birth:* 1948 – *Formal Education After High School:* Bachelor of Science, Utah State University, 1975, Master of Business Administration, Utah State University, 1982. *Business Background for the Preceding Five Years:* Financial Advisor, HDI, 2006-Present.

KristiLyn Wilkinson – *Year of Birth:* 1986 – *Formal Education After High School:* Bachelor of Science, Utah State University, 2011, Master of Family and Consumer Sciences, Utah State University, 2013. *Business Background for the Preceding Five Years:* Financial Advisor, HDI, 2022-Present; Instructor & Program Manager, Utah State University & Brigham Young University-Idaho, 2011-Present.

Patty S. Bartholomew – *Year of Birth:* 1981 – *Formal Education After High School:* Bachelor of Science, Utah State University, 2004. *Business Background for the Preceding Five Years:* Financial Advisor, HDI, 2024-Present; Business Network International, 2020-Present; Financial Advisor, Parsonex Financial Services, 2019-2023.

Stephen F. Neeley – *Year of Birth:* 1960 – *Formal Education After High School:* Bachelor of Arts, Utah State University, 1984, Master of Business Administration, Kellogg Graduate School of Management, Northwestern University, 1985. *Business Background for the Preceding Five Years:* President, HDI, 2004-Present.

Disciplinary Information

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None of the IARs listed in this brochure supplement have had any legal or disciplinary events in their past. Clients and prospective clients can view the CRD records (registration records) for these IARs through the SEC's Investment Adviser Public Disclosure (IAPD) website at www.adviserinfo.sec.gov or through FINRA's BrokerCheck database online at www.finra.org/brokercheck. The applicable CRD numbers are listed on the first page of this brochure supplement.

Other Business Activities

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Aaron J. Neeley, Daniel J. Neeley, Kent Haueter, KristiLyn Wilkinson, Patty S. Bartholomew and Stephen F. Neeley also serve as registered representatives of HDI's Broker-Dealer (hereafter "B-D") selling mutual funds, fixed and variable annuities, and other insurance products. The implications of this dual registration are explained in detail in the Advisory Business, Fees and Compensation, and Other Financial Industry Activities and Affiliations sections of the Firm Disclosure Brochure.

IAR Jack W. Peterson, CPA, serves HDI on a part-time basis. He also performs accounting services on a limited, part-time basis. HDI is not affiliated with his work as an accountant.

Additional Compensation

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Other than compensation paid through HDI's B-D, none of the IARs receive any additional compensation from non-clients for providing advisory services. All advisory compensation is paid by clients directly.

Supervision

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Stephen F. Neeley, President, is primarily responsible for supervision of HDI and its IARs. Because he is an IAR himself, his accounts are reviewed by Daniel J. Neeley, Vice President. Advisory clients may contact either of them directly at 435-752-8484.

Requirements for State-Registered Advisers

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HDI's sole principal executive officer or management person is Stephen F. Neeley. His biographical information is provided in the attached brochure supplement.

The "Other Financial Industry Activities and Affiliations" section of this brochure describes businesses in which HDI is actively engaged other than serving as an RIA.