

Part 2B of Form ADV: Brochure Supplement

Kelsey Financial, LLC

Jeffrey M. Alstot

Trading & Compliance Manager | Investment Advisor Representative

485 E. High Street
Moorpark, CA 93021

Telephone: (833) 4 KELSEY
Website: www.kelseyfinancial.net
Email: jeff@kelseyfinancial.net

December 2023

This brochure supplement provides information about Jeff Alstot that supplements the Kelsey Financial Disclosure Brochure. You should have received a copy of that brochure.

Please contact Kelsey Financial if you did not receive the Kelsey Financial's firm disclosure brochure or if you have any questions about the contents of this supplement.

Additional information about Jeff Alstot is available on the SEC's website at www.adviserinfo.sec.gov and/or FINRA Broker Check website at www.brokercheck.finra.org/. You can search these sites by a unique identifying number, known as a CRD number. Mr. Alstot's CRD # is 5864067.

Item 2 Educational, Background and Business Experience

Full Legal Name: Jeffrey Mark Alstot

Born: 1987

Education:

- Azuza Pacific University, B.A. in Business Administration, 2009;

Business Experience:

- Kelsey Financial; Trading & Compliance Manager | Investment Advisor Representative; 05/2018 to Present
- DFIG Investments; Registered Representative; 10/2017 to 04/2018
- United Planners Financial Services; Registered Representative; 11/2016 to 10/2017
- American Financial Network; Client Service Manager | IAR; 07/2014 to 04/2018
- Financial West Group; Operations; 12/2013 to 04/2014
- Financial West Group; Operations; 08/2010 to 03/2012
- Previous, various, Non-investment related odd-jobs; 05/2005 to 07/2010

Examinations:

- Series 66; 02/2017 to Present and SIE; 05/2018 to Present, and previously held Series 7; 11/2016 - Expired.

Item 3 Disciplinary Information

We are required to disclose all material facts regarding certain legal or disciplinary events pertaining to arbitration awards or other civil, regulatory or administrative proceedings in which our firm or management personnel were found liable or against whom an award was granted.

The following are disciplinary events relating to our firm and/or our management personnel:

No material events to disclose.

Item 4 Other Business Activities***Broker/Dealer Registrations:***

Mr. Alstot is not separately associated with any other FINRA Member broker/dealer and/or SEC registered investment advisor. Mr. Alstot does not receive separate compensation, bonuses or other incentives with respect to investments.

Mr. Alstot has no other outside business activities.

Item 5 Additional Compensation

Jeff Alstot does not receive any economic benefit from a non-advisory client for the provision of advisory services.

Item 6 Supervision

Supervisor: Steve Hoppel

Title: Chief Compliance Officer

Phone Number: (833) 4 KELSEY

As Chief Compliance Officer of Kelsey Financial, Mr. Hoppel is responsible for all supervision, reviews and oversees all material investment policy changes and conducts periodic testing to ensure that client objectives and mandates are met.