

**Part 2B of Form ADV: *Brochure Supplement***

**Kelsey Financial, LLC**

Jonathan M. Fersht

Investment Advisor Representative

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This brochure supplement provides information about Chandler Tso 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 Chandler Tso is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) and/or FINRA Broker Check website at [www.brokercheck.finra.org/](http://www.brokercheck.finra.org/). You can search these sites by a unique identifying number, known as a CRD number. Mr. Fersht's CRD # is 5799239.

**Item 2 Educational, Background and Business Experience**

**Full Legal Name:** Jonathan Michael Fersht

**Born:** 1986

**Education:**

- San Diego State University, Bachelors of Science in Finance, 2009

**Business Experience:**

- Kelsey Financial; Investment Advisor Representative; 12/2022 to Present
- Western International Securities; Trader; 02/2018 to 12/2022
- Isack Bond Investments; Fixed Income Trader; 08/2015 to 02/2018
- Ladenburg Thalman & Co.; Fixed Income Trader; 10/2012 to 08/2015
- Financial West Group.; Fixed Income Trader; 08/2011 to 10/2012

**Examinations:**

- Series 65; 12/2022 to Present; SIE; 10/2018 to Present, Series 7; 6/2010 to Present (Inactive)

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

Mr. Fersht has an investment-related outside business activity with respect to his passive investment in a private placement business venture. Mr. Fersht is not an officer or solicitor for this or any private investment.

Our firm mitigates this conflict by disclosing these facts to our clients.

### **Item 5 Additional Compensation**

Mr. Fersht 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.