

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

**Kelsey Financial, LLC**

Ilan M. Fersht

Investment Advisor Representative

485 E. High Street  
Moorpark, CA 93021

Telephone: (833) 4 KELSEY  
Website: [www.kelseyfinancial.net](http://www.kelseyfinancial.net)  
Email: [ilan@kelseyfinancial.net](mailto:ilan@kelseyfinancial.net)

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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 1174011.

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

**Full Legal Name:** Ilan Meir Fersht

**Born:** 1957

**Education:**

- California State Northridge, Bachelors of Science in Finance, 1981

**Business Experience:**

- Kelsey Financial; Investment Advisor Representative; 05/2023 to Present
- Western International Securities; RR / IAR; 08/2017 to 05/2023
- Financial West Group; RR / IAR / Fixed Income Trader; 06/1991 to 08/2017
- Investacorp, Inc.; Registered Representative; 08/1988 to 06/1991
- Municicorp of California; Registered Representative; 08/1983 to 08/1988

**Examinations:**

- Series 65 - Exemption 08/1983 to Present; SIE - 10/2018 to 05/2023, Series 7 - 08/1993 to 05/2023, Series 63 - 07/1992 to 05/2023, Series 24 - 06/1992 to 05/2023.

### **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 investment-related business activities with respect to his associations with the following companies: Bunia Enterprisez, Inc, Kaliker Enterprises, LLC, Lucern Valley Enterprises, LLC. These are 'friends and family' entities that Mr. Fersht does not control and at no time is he a solicitor for these or any other companies.

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.