

**Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
May 2017**

Ann J. Shubert

**Intentional Finance, LLC
7770 Jefferson St NE, Suite 430
Albuquerque, NM 87109
www.intentionalfinancelc.com**

**Firm Contact:
Susan Kroger
Managing Member**

This brochure supplement provides information about Ms. Shubert that supplements our brochure. You should have received a copy of that brochure. Please contact Ms. Kroger if you did not receive Intentional Finance, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Shubert is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD #6413618.

Item 2: Educational Background & Business Experience

Ann Judith Shubert

Year of Birth: 1957

Educational Background:

- 2015: University of New Mexico; Master of Business Administration in Business
- 1982: California Institute of Technology; Master of Science in Physics
- 1979: Princeton University; Bachelor of Arts in Physics

Business Background:

- 05/2017 – Present Intentional Finance, LLC; Managing Member, Chief Compliance Officer & Investment Adviser Representative
- 05/2017 – Present Intentional Insurance, LLC; Managing Member & Insurance Agent
- 03/2015 – 05/2017 W&R Insurance Agency, Inc.; Financial Advisor
- 10/2014 – 05/2017 Waddell & Reed, Inc; Financial Advisor
- 09/2013 – 08/2014 Ball Aerospace; Advanced Systems Manager
- 02/2008 – 09/2013 Applied Technology Associates; Business Unit Manager
- 10/2004 – 02/2008 General Dynamics; Program Manager

Exams, Licenses & Other Professional Designations:

- 2014: Series 7 Exam
- 2015: Series 66 Exam
- 2015: NM Life and Health

Item 3: Disciplinary Information¹

There are no legal or disciplinary events material to the evaluation of Ms. Shubert.

Item 4: Other Business Activities

Ms. Shubert is a Managing Member and insurance agent with Intentional Insurance, LLC. She may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Ms. Shubert, as a fiduciary, will act in the client's best interest.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Item 5: Additional Compensation

Ms. Shubert does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Susan Kroger, Managing Member of Intentional Finance, LLC, supervises and monitors Ms. Shubert's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. Kroger if you have any questions about Ms. Shubert's brochure supplement at 505-563-4500.

Item 7: Requirements for State-Registered Advisers

Ms. Shubert has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, she has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.

Item 1: Cover Page
Part 2B of Form ADV: Brochure Supplement
May 2017

Susan M. Kroger

Intentional Finance, LLC
7770 Jefferson St NE, Suite 430
Albuquerque, NM 87109
www.intentionalfinancelc.com

Firm Contact:
Ann J. Shubert
Chief Compliance Officer

This brochure supplement provides information about Ms. Kroger that supplements our brochure. You should have received a copy of that brochure. Please contact Ms. Shubert if you did not receive Intentional Finance, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Kroger is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD # 4622958.

Item 2: Educational Background & Business Experience

Susan Michelle Kroger

Year of Birth: 1967

Educational Background:

- 1998: University of Chicago; Master of Business Administration in Finance
- 1990: Oregon State University; Bachelor of Science in Business

Business Background:

- 05/2017 – Present Intentional Finance, LLC; Managing Member & Investment Adviser Representative
- 05/2017 – Present Intentional Insurance, LLC; Managing Member & Insurance Agent
- 04/2003 – 05/2017 Waddell & Reed; Financial Advisor
- 01/2003 – 05/2017 W&R Insurance Agency, Inc.; Financial Advisor

Exams, Licenses & Other Professional Designations:

- 2003: Series 7 & 66 Exams
- 2003: NM Life and Health
- 2005: Chartered Mutual Funds Counselor (CMFC®)
- 2015: Certified Divorce Financial Analyst (CDFA®)

The CMFC® Program is the only industry-recognized mutual fund designation. It is the result of collaboration between the College for Financial Planning® and the Investment Company Institute ("ICI"), the primary trade association for the mutual fund industry. The program's quality and thoroughness reflect the combined experience and expertise of the College and the ICI. The College for Financial Planning® awards the CMFC® designation to students who successfully complete the program; pass the final examination and comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct and Terms and Conditions. Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are required to be disclosed. Continued use of the CMFC® designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the CMFC® designation by completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct.

The CDFA® designation is made available through the Institute of Divorce Financial Analysts. Individuals with a minimum of 3 years of professional experience in finance or divorce are eligible to enroll in the CDFA® course. This includes experience as a financial professional, accountant, or matrimonial lawyer. Candidates should also have working knowledge of financial calculators. After completing the CDFA® course, the designation is valid for 1 year, after which designees must pay an annual re-instatement fee. To retain the CDFA® designation, designees must also obtain 15 divorce-related hours of continuing education every 2 years.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to the evaluation of Ms. Kroger.

Item 4: Other Business Activities

Ms. Kroger is a Managing Member and insurance agent with Intentional Insurance, LLC. She may offer insurance products and receive customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation earned. To mitigate this potential conflict, Ms. Kroger, as a fiduciary, will act in the client's best interest.

Item 5: Additional Compensation

Ms. Kroger does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Ms. Shubert, Chief Compliance Officer of Intentional Finance, LLC, supervises and monitors Ms. Kroger's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. Shubert if you have any questions about Ms. Kroger's brochure supplement at 505-563-4500.

Item 7: Requirements for State-Registered Advisers

Ms. Kroger has not been involved in any arbitration claim alleging damages in excess of \$2,500. Furthermore, she has neither been involved in nor found liable in any civil, self-regulatory organization, or administrative proceeding nor has been the subject of any bankruptcy petitions.