

Item 1: Cover Page Supervised Person Brochure

Part 2B of Form ADV

Gerald D. Green Jr.



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This brochure supplement provides information about Gerald D. Green Jr. and supplements the Mattson Financial Services, LLC's brochure. You should have received a copy of that brochure. Please contact Gerald D. Green Jr. if you did not receive Mattson Financial Services, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Gerald D. Green Jr. (CRD #6342617) is available on the SEC's website at www.adviserinfo.sec.gov.

February 16, 2021

Brochure Supplement (Part 2B of Form ADV)

Supervised Person Brochure

Gerald D. Green Jr.

- Year of birth: 1976

Item 2: Education Background and Business Experience

Educational Background:

- Attended Embry-Riddle Aeronautical University; 08/1994 to 10/1995

Business Experience:

- Mattson Financial Services, LLC; Investment Advisor Representative; 03/2017 to Present
- Lakeview Financial Group, LLC; Insurance Agent; 06/2016 to Present
- Gerber Life; Insurance Agent; 03/2015 to 06/2016
- Wal-Mart; Supervisor; 10/2014 to 03/2015
- Pruco Securities, LLC; Registered Representative; 07/2014 to 10/2014
- The Prudential Insurance Company of America; Insurance Agent; 04/2014 to 10/2014
- Best Buy; Manager; 03/1999 to 03/2014

Item 3: Disciplinary Information

Criminal or Civil Action: None to report.

Administrative Proceeding: None to report

Self-Regulatory Organization Proceeding: None to report

Item 4: Other Business Activities Engaged In

Gerald Green is an insurance agent with Lakeview Financial Group, LLC. Approximately 25% of his time is spent on this activity. From time to time, he may offer clients advice or products from this activity.

These practices represent conflicts of interest because it gives Mr. Green an incentive to recommend products based on the commission amount received. This conflict is mitigated by disclosures, procedures, and the firm's fiduciary obligation to place the best interest of the client first and the clients are not required to purchase any products. Clients have the option to purchase these products through another insurance agent of their choosing.

Item 5: Additional Compensation

Mr. Green receives separate yet typical compensation in the form of commissions from insurance companies on the insurance products he sells. He does not receive any performance based fees.

Mr. Green may receive certain benefits from Gradient Investments, LLC (and/or its affiliated companies) based on achieving certain production thresholds. These thresholds are not based on the sale of any specific product or specific product type. These incentives include marketing assistance, access to technology, office support, and business trainings and trips. While some of these benefit the client, such as technology and training, some do not. This creates a conflict of interest because it gives an incentive to the representative to meet this threshold. This conflict is mitigated by disclosures, procedures and the firm's fiduciary obligation to place the best interest of the Client first. Clients are not required to use Gradient Investments, LLC or any of its affiliated companies.

Item 6: Supervision

Gerald Green is supervised by Gary Mattson, Chief Compliance Officer. He reviews Gerald's work through client account reviews, quarterly personal transaction reports as well as face-to-face and phone interactions. Mr. Mattson can be contacted at 800-536-8907 or by email at gmattson@mattsoncompanies.com.
