

**Item 1: Cover Page Supervised Person Brochure**

Part 2B of Form ADV

**Taylor F. Steward**



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This brochure supplement provides information about Taylor F. Steward and supplements the Mattson Financial Services, LLC's brochure. You should have received a copy of that brochure. Please contact Taylor F. Steward 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 Taylor F. Steward (CRD #7093084) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**February 16, 2021**

## Brochure Supplement (Part 2B of Form ADV)

### Supervised Person Brochure

#### Taylor F. Steward

- Year of birth: 1992

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#### Item 2: Education Background and Business Experience

##### Educational Background:

- Attended Delta College; 09/2011 to 06/2012

##### Business Experience:

- Mattson Financial Services, LLC; Investment Advisor Representative; 04/2019 to Present
- Fred Haight Insurance Agency; Insurance Agent; 03/2018 to Present
- Native Retrievers; Owner; 03/2016 to Present
- Lakeview Financial Group, LLC; Manager/Insurance Agent; 10/2014 to Present
- Goldstar Outdoors II; Technician/Sales; 06/2009 to 10/2014
- Lucky Dogs Hunts, Inc; Guide; 10/2012 to 12/2013
- Full-Time Student; 04/2009 to 06/2012

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#### Item 3: Disciplinary Information

*Criminal or Civil Action:* None to report.

*Administrative Proceeding:* None to report

*Self-Regulatory Organization Proceeding:* None to report

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#### Item 4: Other Business Activities Engaged In

Taylor Steward is an insurance agent with Fred Haight Insurance Agency and Lakeview Financial Group, LLC. From time to time, he may offer clients advice or products from this activity. This practice represents a conflict of interest because it gives Mr. Steward 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.

Additionally, Taylor Steward works as a dog breeder and trainer for Native Retrievers. This business activity does not create any conflict of interest as clients of Native Retrievers are not solicited for services of Mattson Financial Services, LLC.

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#### Item 5: Additional Compensation

Mr. Steward 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. Steward 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.

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**Item 6: Supervision**

Taylor Steward is supervised by Gary Mattson, Chief Compliance Officer. He reviews Taylor'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](mailto:gmattson@mattsoncompanies.com).