

## **F5 Financial Planning, L.L.C.**

[www.f5fp.com](http://www.f5fp.com)

Brochure Supplement  
(Part 2B of Form ADV)

F5 Financial Planning, L.L.C.  
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Spokane Valley, WA 99206

This brochure provides information about Robert J. Anderberg, CFP® that supplements the F5 Financial Planning, L.L.C.'s ["F5FP"s] brochure. You should have received a copy of that brochure. Please contact Curtis L. Stowers at: (630) 474-5213, or by email at: [info@f5fp.com](mailto:info@f5fp.com) if you did not receive a copy of F5FP's brochure or if you have any questions about the contents of this supplement. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission, or by any state securities authority. Registration does not imply a certain level of skill or training.

Additional information about F5FP is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)

September 6, 2022

Updated September 6, 2022

## **Item 2: Educational Background and Business Experience**

Year of Birth

1967

Formal Educational after High School

- MS in Plant Physiology, Washington State University, Pullman, WA
- BS in Microbiology, Washington State University, Pullman, WA
- Uniform Investment Adviser Law Exam/NASAA Series 65
- National Social Security Advisor Certificate
- Investment Company and Variable Contracts Products Representative Exam/FINRA Series 6
- Security Industry Essentials Exam/FINRA SIE
- Uniform Securities Agent State Law Exam/NASAA Series 63
- Washington State Life, Disability, Variable Life & Variable Annuity Insurance License

Business Background

- Advisor, F5 Financial Planning, L.L.C.; Spokane Valley, WA (2020 – Present)
- Advisor, Forster Financial; Spokane, WA (2018 – 2020)
- Senior Lab Technologist, Providence Health & Services; Spokane, WA (2002 – 2018)
- Co-owner, Wild Ivy Floral; Pullman, WA (1998 – 2002)

## **Item 3: Disciplinary Information**

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable in this section. There are no criminal or civil actions, administrative enforcement proceedings, self-regulatory organization enforcement proceedings or any other proceedings applicable to F5FP or Mr. Anderberg.

## **Item 4: Other Business Activity**

Mr. Anderberg owns a condominium with his wife that generates income as an unfurnished long-term rental.

## **Item 5: Additional Compensation**

Mr. Anderberg is not compensated for advisory services involving performance-based fees. He is not a senior executive of or insider to an issuer of a security. Our firm also prohibits employees from accepting or receiving additional economic benefit, such as sales awards or other prizes, for providing advisory services to its clients.

Mr. Anderberg is not actively engaged in another investment-related business or occupation; he is not registered nor has an application pending to register as a registered representative of a broker / dealer or associated person of a futures commission merchant, commodity pool operator, or commodity trading advisor. Therefore, he does not receive commissions, bonuses or other compensation based on the sale of securities or other investment products, including that as a registered representative of a broker / dealer, and including distribution or service ("trail") fees from the sale of mutual funds.

#### **Item 6: Supervision**

Mr. Anderberg serves in multiple capacities for F5FP including customer support representative, financial advisor, and investment advisor. We recognize that inability to segregate certain duties may potentially create conflicts of interest. However, we employ policies and procedures to ensure timely and accurate record keeping and supervision, including outsourcing certain functions to qualified entities to assist in these efforts when necessary.

Questions relative to our firm, its services in this ADV Part 2A may be made to the attention of Mr. Curtis Stowers at (630) 474-5213. Additional information about the firm, other advisory firms, or associated investment advisor representatives, including Mr. Anderberg, is available on the internet at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov) . A search of this site for firms may be accomplished by firm name or unique firm identifier, known as IARD number.

The IARD number for F5FP is 170674. You may also search Mr. Anderberg by name or his reference number, which is 7020592.

The business and disciplinary history, if any, of an investment advisory firm and its representatives may also be obtained by calling the Illinois Securities Department at (800) 628-7937

#### **Item 7 Requirements for State-Registered Advisors**

There have been neither arbitration awards nor any sanctions or other matters where F5FP has been found liable in any civil, self-regulatory or administrative proceedings. Further, neither have F5FP nor Mr. Anderberg been the subject of a bankruptcy petition.