

Item 1: Cover Page



An Exceptional Life Financial, LLC

5455 W 86th Street
Suite 205
Indianapolis, IN 46268

(317) 941-6492

Dated: August 8, 2023

Form ADV Part 2B – Brochure Supplement

For:

Mychal Eagleson - Individual CRD# 5890838

President and Chief Compliance Officer

This brochure supplement provides information about Mychal Eagleson that supplements the An Exceptional Life Financial, LLC ("AELF") brochure. A copy of that brochure precedes this supplement. Please contact Mychal Eagleson if the AELF brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Mychal Eagleson is available on the SEC's website at www.adviserinfo.sec.gov which can be found using the identification number 5890838.

Item 2: Educational Background and Business Experience

Regulatory guidance requires the firm to disclose relevant post-secondary education and professional training for each principal executive and associate of the firm, as well as their business experience for at least the most recent five years.

Educational Background

- 2013 - New York University, Certificate in Financial Planning
- 2012 - Indiana Wesleyan University, Bachelor of Science in Management

Business Experience

- 06/2017 - Present, An Exceptional Life Financial, LLC, President and CCO
- 10/2015 - 06/2017, BKD Wealth Advisors, Senior Advisor II
- 05/2014 - 09/2015, Schwab Private Client Investment Advisory, Portfolio Consultant
- 05/2013 - 05/2014, Eagleson Financial Planning LLC, President, Financial Planner
- 06/2008 - 05/2013, PNC Bank, N.A. & Charles Schwab & Co., Inc., Various Roles

Professional Designations, Licensing & Exams

CERTIFIED FINANCIAL PLANNER™, CFP®: The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 85,000 individuals have obtained CFP® certification in the United States. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- **Education** – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- **Experience** – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year; and
- **Ethics** – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Accredited Investment Fiduciary, AIF®: The AIF® designation certifies that the recipient has specialized knowledge of the fiduciary standards of care and their application to the investment management process. To Receive the AIF® designation, individuals must complete a training program, successfully pass a comprehensive, closed-book final exam, under the supervision of a proctor, and agree to abide by the AIF Code of Ethics. In order to maintain the AIF® designation, the individual must annually renew their affirmation of the AIF® Code of Ethics and complete six hours of continuing education credits. The certification is administered by the Center for Fiduciary Studies, LLC (a Fiduciary360 (fi360) company).

Chartered Special Needs Consultant, ChSNC®: Individuals who hold the ChSNC® designation are equipped with the specialized skills needed to help parents and caregivers plan for the future with honesty, ethics and compassion. A ChSNC® can navigate the unique considerations, estate planning, special needs trusts, life insurances, tax deductions, healthcare issues, Medicaid complexities, and the emotional aspects of providing for a loved one with a disability. Use of the ChSNC® credential is governed by the American College of Financial Services and requires an extensive financial planning background and individuals must pass three closed-book, course specific, two-hour proctored examinations.

Item 3: Disciplinary Information

Registered investment advisers are required to disclose certain material facts about its associated personnel regarding any legal or disciplinary events, including criminal or civil action in a domestic, foreign or military court, or any proceeding before a state, federal or foreign regulatory agency, self-regulatory organization, or suspension or sanction by a professional association for violation of its conduct rules, that would be material to your evaluation of each officer or a supervised person providing investment advice. Mychal Eagleson has not been the subject of any such event requiring disclosure.

Item 4: Other Business Activities

Investment adviser representatives are required to disclose outside business activities that account for a significant portion of their time or income, or that may present a conflict of interest with their advisory activities.

Mychal Eagleson is a licensed insurance agent and able to sell annuities, life, health, and long-term care coverage to interested parties through various unaffiliated insurance companies where he receives a commission and renewal income from the issuer on a client's purchase of an insurance contract. This activity involves up to 5% of his time during traditional business hours each month. He performs in the role as insurance agent or investment adviser representative and will disclose in advance of a transaction or advisory agreement the capacity in which he is serving a client, to include the conflict of interest the role or service to be provided incurs. He receives commissions, overrides or other compensation from the sale of an insurance contract through various unaffiliated carriers. Mr. Eagleson and our investment advisory firm take their responsibilities seriously and intend to only make recommendations believed appropriate for the client.

Neither Mr. Eagleson nor our advisory firm has a material relationship with the issuer of a security. 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 adviser. He

does not receive commissions, bonuses or other compensation based on the sale of securities, including that as a registered representative.

Item 5: Additional Compensation

Neither our advisory firm nor Mr. Eagleson is compensated for advisory services involving performance-based fees. In addition, firm policy does not allow associated persons to accept or receive additional economic benefit, such as sales awards or other prizes, for providing advisory services to firm clients.

Item 6: Supervision

Mychal Eagleson serves as the firm's Chief Compliance Officer. Because supervising oneself poses a conflict of interest, the firm has adopted policies and procedures to mitigate this conflict. Questions related to the firm, its services, or this Form ADV Part 2B may be made to the attention of Mr. Eagleson at 317-941-6492. Additional information about the firm, other advisory firms, or an associated investment adviser representative is available on the Internet at www.adviserinfo.sec.gov. A search of this site for firms may be accomplished by firm name or a unique firm identifier, known as an IARD or CRD number. The IARD number for our firm is 288742. Mr. Eagleson's CRD number is 5890838. The business and disciplinary history, if any, of an investment advisory firm and its representatives may also be obtained by calling the securities commissioner's office in the state where the client resides.

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Dated: August 8, 2023

Form ADV Part 2B – Brochure Supplement

For:

Thomas Farrer - Individual CRD# 7236529

Financial Planner

This brochure supplement provides information about Thomas Farrer that supplements the An Exceptional Life Financial, LLC (“AELF”) brochure. A copy of that brochure precedes this supplement. Please contact Mychal Eagleson if the AELF brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Thomas Farrer is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 7236529.

Item 2: Educational Background and Business Experience

Regulatory guidance requires the firm to disclose relevant post-secondary education and professional training for each principal executive and associate of the firm, as well as their business experience for at least the most recent five years.

Educational Background

- 2019 - College for Financial Planning, CERTIFIED FINANCIAL PLANNER™ Program
- 1988 - Krannert Graduate School of Management, Purdue University, Master's Degree in Industrial Administration
- 1984 - University of Notre Dame, Bachelor of Science in Electrical Engineering,

Business Experience

- 03/2020 - Present, An Exceptional Life Financial, LLC, Financial Planner
- 05/2013 - 05/2015, Indiana Public Retirement System (INPRS), Director of Strategic Initiatives
- 05/2010 - 05/2013, Delphi Automotive, Director of Customer Satisfaction
- 05/1984 - 05/2010, Delphi Automotive, Various Leadership Roles

Professional Designations, Licensing & Exams

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The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 85,000 individuals have obtained CFP® certification in the United States. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year; and
- Ethics – Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Chartered Retirement Planning Counselor, CRPC®: The CRPC® designation is recognized as the industry-benchmark for retirement planning credentials. The CRPC® designation program is for experienced financial advisors who wish to offer more comprehensive retirement advice to individual clients. Financial advisors face an increasingly complex set of retirement planning questions as aging baby boomers look for investments to meet their lifestyle needs in 10 years, 20 years, and beyond, as well as determining when they can actually retire. The program covers in depth insights into many retirement planning topics, including: when to retire, making the most of Social Security, navigating health care options in retirement, designing an optimal retirement income stream, as well as tax and estate planning.

Item 3: Disciplinary Information

Registered investment advisers are required to disclose certain material facts about its associated personnel regarding any legal or disciplinary events, including criminal or civil action in a domestic, foreign or military court, or any proceeding before a state, federal or foreign regulatory agency, self-regulatory organization, or suspension or sanction by a professional association for violation of its conduct rules, that would be material to your evaluation of each officer or a supervised person providing investment advice. Thomas Farrer has not been the subject of any such event requiring disclosure.

Item 4: Other Business Activities

Investment adviser representatives are required to disclose outside business activities that account for a significant portion of their time or income, or that may present a conflict of interest with their advisory activities. Thomas Farrer is not involved with outside business activities.

Item 5: Additional Compensation

Neither our advisory firm nor Mr. Farrer is compensated for advisory services involving performance-based fees. In addition, firm policy does not allow associated persons to accept or receive additional economic benefit, such as sales awards or other prizes, for providing advisory services to firm clients.

Item 6: Supervision

Mychal Eagleson serves as Chief Compliance Officer and supervises the firm's advisory activities and its associates. Our firm requires all associates to adhere to our processes and procedures as described in our Code of Ethics and procedural guidelines. In addition, we monitor our associates by performing the following ongoing reviews:

- Account opening documentation.
- Review of financial plans and/or investment account transactions.
- Review of client communications.
- Periodic office reviews.

Questions related to the firm, its services, or this Form ADV Part 2B may be made to the attention of Mr. Eagleson at 317-941-6492. Additional information about the firm, other advisory firms, or an associated investment advisor representative is available at www.adviserinfo.sec.gov. A search of this site for firms may be accomplished by firm name or a unique firm identifier, known as an IARD or CRD number. The IARD number for our firm is 288742. Thomas Farrer's CRD number is 7236529. The business and disciplinary history, if any, of an investment advisory firm and its representatives may also be obtained by calling the securities commissioner's office in the state where the client resides.

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Dated: August 8, 2023

Form ADV Part 2B – Brochure Supplement

For:

C. Rick Skinner - Individual CRD# 2933971

Financial Planner

This brochure supplement provides information about C. Rick Skinner that supplements the An Exceptional Life Financial, LLC ("AELF") brochure. A copy of that brochure precedes this supplement. Please contact Mychal Eagleson if the AELF brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about C. Rick Skinner is available on the SEC's website at www.adviserinfo.sec.gov which can be found using the identification number 2933971.

Item 2: Educational Background and Business Experience

Regulatory guidance requires the firm to disclose relevant post-secondary education and professional training for each principal executive and associate of the firm, as well as their business experience for at least the most recent five years.

Educational Background

- 1987 - College for Financial Planning, CERTIFIED FINANCIAL PLANNER™ Program
- 1975 - International Business College, Associate Degree in Professional Accounting

Business Experience

- 11/2021 - Present, An Exceptional Life Financial, LLC, Financial Planner
- 07/2013 - 12/2021, Watermark Wealth Management, LLC, Investment Adviser Representative
- 03/2011 - 10/2013, Summit CPA Group, Investment Adviser Representative/CCO
- 03/2002 - 03/2011, Skinner Financial Services, Financial Advisor
- 06/2001 - 03/2002, Investment Advisors of Indianapolis, Investment Advisor
- 07/1999 - 05/2001, Axia Advisory Corp., Investment Management Consultant

Professional Designations, Licensing & Exams

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- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- **Experience** – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year; and
- **Ethics** – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

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- Ethics – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Enrolled Agent, EA: This is a tax designation obtained by those who focus on preparing income and/or estate tax returns. The special agent exam administered by the Internal Revenue Service (IRS) is broken down into four three-hour sessions spanning two days. The test covers personal, estate and corporate taxes, as well as ethics and Internal Revenue Service regulations, but does not include straight accounting, auditing, or bookkeeping of any kind. It could perhaps be said that the Enrolled Agent designation allows tax preparers to roughly equate themselves to CPAs within the specific confines of tax preparation.

Accredited Investment Fiduciary, AIF®: The AIF® designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF® designation, individuals must complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor, and agree to abide by the AIF® Code of Ethics. In order to maintain the AIF® designation, the individual must annually renew their affirmation of the AIF® Code of Ethics and complete six hours of continuing education credits. The certification is administered by the Center for Fiduciary Studies, LLC (a Fiduciary360 (fi360) company).

Item 3: Disciplinary Information

Registered investment advisers are required to disclose certain material facts about its associated personnel regarding any legal or disciplinary events, including criminal or civil action in a domestic, foreign or military court, or any proceeding before a state, federal or foreign regulatory agency, self-regulatory organization, or suspension or sanction by a professional association for violation of its conduct rules, that would be material to your evaluation of each officer or a supervised person providing investment advice. C. Rick Skinner has not been the subject of any such event requiring disclosure.

Item 4: Other Business Activities

Investment adviser representatives are required to disclose outside business activities that account for a significant portion of their time or income, or that may present a conflict of interest with their advisory activities. C. Rick Skinner is not involved with outside business activities.

Item 5: Additional Compensation

Neither our advisory firm nor Mr. Skinner is compensated for advisory services involving performance-based fees. In addition, firm policy does not allow associated persons to accept or receive additional economic benefit, such as sales awards or other prizes, for providing advisory services to firm clients.

Item 6: Supervision

Mychal Eagleson serves as Chief Compliance Officer and supervises the firm's advisory activities and its associates. Our firm requires all associates to adhere to our processes and procedures as described in our Code

of Ethics and procedural guidelines. In addition, we monitor our associates by performing the following ongoing reviews:

- Account opening documentation.
- Review of financial plans and/or investment account transactions.
- Review of client communications.
- Periodic office reviews.

Questions related to the firm, its services, or this Form ADV Part 2B may be made to the attention of Mr. Eagleson at 317-941-6492. Additional information about the firm, other advisory firms, or an associated investment advisor representative is available at www.adviserinfo.sec.gov. A search of this site for firms may be accomplished by firm name or a unique firm identifier, known as an IARD or CRD number. The IARD number for our firm is 288742. C. Rick Skinner's CRD number is 2933971. The business and disciplinary history, if any, of an investment advisory firm and its representatives may also be obtained by calling the securities commissioner's office in the state where the client resides.

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5455 W 86th Street
Suite 205
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(317) 941-6492

Dated: August 8, 2023

Form ADV Part 2B – Brochure Supplement

For:

David Gourley - Individual CRD# 7341867

Financial Planner

This brochure supplement provides information about David Gourley that supplements the An Exceptional Life Financial, LLC (“AELF”) brochure. A copy of that brochure precedes this supplement. Please contact Mychal Eagleson if the AELF brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about David Gourley is available on the SEC’s website at www.adviserinfo.sec.gov which can be found using the identification number 7341867.

Item 2: Educational Background and Business Experience

Regulatory guidance requires the firm to disclose relevant post-secondary education and professional training for each principal executive and associate of the firm, as well as their business experience for at least the most recent five years.

Educational Background

- 2017 - Arkansas State University, Educational Specialist Degree in Leadership & Administration
- 2016 - Arkansas State University, Masters of Education in Educational Leadership & Administration
- 2008 - Missouri State University, Bachelor's Degree in Finance

Business Experience

- 05/2022 - Present, An Exceptional Life Financial, LLC, Financial Planner
- 04/2021 - 05/2022, Reliant Financial Services, Financial Representative
- 03/2018 - 06/2021, The Budget Teacher, Financial Coach
- 08/2012 - 08/2020, Park Hill School District, Math Teacher

Professional Designations, Licensing & Exams

Certified Student Loan Professional®, CSLP®: The CSLP® Program is the leading course training financial professionals how to deliver student loan advisory services, culminating in the Certified Student Loan Professional® designation. The designation is earned through an online course and certification process, accredited through Cal Poly Humboldt, a campus of the California State University system. It helps advisors to accurately advise clients about student loan repayment and forgiveness within the scope of their financial goals.

Series 66 Exam: The Series 66, the Uniform Combined State Law Examination, qualifies an individual as if he or she had passed both the Series 63 and Series 65. However, to register as an investment adviser representative based on the Series 66, an individual must also have passed the FINRA Series 7 exam and the exam must be valid (i.e., not expired).

Item 3: Disciplinary Information

Registered investment advisers are required to disclose certain material facts about its associated personnel regarding any legal or disciplinary events, including criminal or civil action in a domestic, foreign or military court, or any proceeding before a state, federal or foreign regulatory agency, self-regulatory organization, or suspension or sanction by a professional association for violation of its conduct rules, that would be material to your evaluation of each officer or a supervised person providing investment advice. David Gourley has not been the subject of any such event requiring disclosure.

Item 4: Other Business Activities

Investment adviser representatives are required to disclose outside business activities that account for a significant portion of their time or income, or that may present a conflict of interest with their advisory activities.

David Gourley is a licensed insurance agent and able to sell annuities, life, health, and long-term care coverage to interested parties through various unaffiliated insurance companies where he receives a commission and renewal income from the issuer on a client's purchase of an insurance contract. This activity involves up to 5% of his time during traditional business hours each month. He performs in the role as insurance agent or investment adviser representative and will disclose in advance of a transaction or advisory agreement the capacity in which he is serving a client, to include the conflict of interest the role or service to be provided incurs. He receives commissions, overrides or other compensation from the sale of an insurance contract through various unaffiliated

carriers. Mr. Gourley and our investment advisory firm take their responsibilities seriously and intend to only make recommendations believed appropriate for the client.

Neither Mr. Gourley nor our advisory firm has a material relationship with the issuer of a security. 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 adviser. He does not receive commissions, bonuses or other compensation based on the sale of securities, including that as a registered representative.

Item 5: Additional Compensation

Neither our advisory firm nor Mr. Gourley is compensated for advisory services involving performance-based fees. In addition, firm policy does not allow associated persons to accept or receive additional economic benefit, such as sales awards or other prizes, for providing advisory services to firm clients.

Item 6: Supervision

Mychal Eagleson serves as Chief Compliance Officer and supervises the firm's advisory activities and its associates. Our firm requires all associates to adhere to our processes and procedures as described in our Code of Ethics and procedural guidelines. In addition, we monitor our associates by performing the following ongoing reviews:

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