# F5 Financial Planning, L.L.C.

www.f5fp.com Brochure Supplement (Part 2B of Form ADV)

F5 Financial Planning, L.L.C. 4003 Heron Court Naperville, IL 60564 (630) 474-5213

This brochure provides information about Curtis L. Stowers, 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: <a href="mailto:info@f5fp.com">info@f5fp.com</a> 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

October 30, 2018

# Item 2: Educational Background and Business Experience

Year of Birth

1966

Formal Educational after High School

- PhD in Industrial Engineering, University of Illinois; Urbana-Champaign, IL
- MS in Industrial Engineering, University of Illinois; Urbana-Champaign, IL
- BS in Industrial Engineering, University of Illinois; Urbana-Champaign, IL
- Uniform Investment Advisor State Law Examination/NASAA Series 65

# **Business Background**

- Principal, F5 Financial Planning, L.L.C.; Naperville, IL (2012 Present)
- Financial Planner, Sebold Capital Management, Inc.; Naperville, IL (2013-2014)
- Manager, Caterpillar Logistics Services, LLC; Peoria and Naperville, IL (1994-2012)
- Owner/Landlord, Midwest Business Ventures, LLC; Lakin, KS (2004 2017)

# **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. Stowers.

# **Item 4: Other Business Activity**

Mr. Stowers does not currently participate in any outside business activities.

#### **Item 5: Additional Compensation**

Mr. Stowers 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. Stowers 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. Stowers serves in multiple capacities for F5FP: managing member, firm principal (supervisor), financial planner and investment advisor representative, and designated principal and/or supervisor for all advisors. 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. Stowers at (630) 474-5213. Additional information about the firm, other advisory firms, or associated investment advisor representatives, including Mr. Stowers, is available on the internet at <a href="https://www.advisorinfo.sec.gov">www.advisorinfo.sec.gov</a>. 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. Stowers by name or his reference number, which is 6011385.

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. Stowers been the subject of a bankruptcy petition.