

This brochure supplement provides information about Patrick Lee Reid that supplements the Plan2Thrive Financial, LLC brochure. You should have received a copy of that brochure. Please contact Patrick Lee Reid if you did not receive Plan2Thrive Financial, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Patrick Lee Reid is also available on the SEC's website at www.adviserinfo.sec.gov.

Plan2Thrive Financial, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Patrick Lee Reid

Personal CRD Number: 6218011

Investment Adviser Representative

Plan2Thrive Financial, LLC
220 W Davenport St
Eldridge, IA 52748
(563) 323-5790
patrick@plan2thrivefs.com

UPDATED: 03/24/2022

Item 2: Educational Background and Business Experience

Name: Patrick Lee Reid **Born:** 1969

Educational Background and Professional Designations:

Education:

Masters Project Management, Keller Graduate School Of Management - 2000

Masters Marketing Management, St Ambrose University - 1994

BA Economics, Coe College - 1992

BA Business Administration, Coe College - 1992

Business Background:

10/2021 - Present Investment Adviser Representative
Plan2Thrive Financial, LLC

01/2022 - Present Part Owner
The Vault Coffee & Café LLC

09/2021 - Present Part Owner
Plumb Line Properties LLC

01/2017 - 12/2021 Registered Rep/IAR
Plan2Thrive Financial Services

01/2017 - 12/2021 Registered Representative
LPL Financial LLC

06/2016 - 01/2017 Investment Adviser Representative
Eagle Strategies LLC

06/2013 - 01/2017 Registered Representative
NY Life Securities LLC

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Patrick Lee Reid is a licensed insurance agent. This activity creates a conflict of interest since there is an incentive to recommend insurance products based on commissions or other benefits received from the insurance company, rather than on the client's needs. Additionally, the offer and sale of insurance products by supervised persons of Plan2thrive Financial Services are not made in their capacity as a fiduciary, and products are limited to only those offered by certain insurance providers. Plan2thrive Financial Services addresses this conflict of interest by requiring its supervised persons to act in the best interest of the client at all times, including when acting as an insurance agent. Plan2thrive Financial Services periodically reviews recommendations by its supervised persons to assess whether they are based on an objective evaluation of each client's risk profile and investment objectives rather than on the receipt of any commissions or other benefits. Plan2thrive Financial Services will disclose in advance how it or its supervised persons are compensated and will disclose conflicts of interest involving any advice or service provided. At no time will there be tying between business practices and/or services (a condition where a client or prospective client would be required to accept one product or service conditioned upon the selection of a second, distinctive tied product or service). No client is ever under any obligation to purchase any insurance product. Insurance products recommended by Plan2thrive Financial Services's supervised persons may also be available from other providers on more favorable terms, and clients can purchase insurance products recommended through other unaffiliated insurance agencies.

Patrick Lee Reid is a Life Coach with Plan2Trive Life Coaching.

Patrick Lee Reid is part owner of Plumb Line Properties LLC, a real estate holding entity.

Patrick Lee Reid is part owner of The Vault Coffee & Café LLC.

Item 5: Additional Compensation

Patrick Lee Reid does not receive any economic benefit from any person, company, or organization, other than Plan2Thrive Financial, LLC in exchange for providing clients advisory services through Plan2Thrive Financial, LLC.

Item 6: Supervision

As the Chief Compliance Officer of Plan2Thrive Financial, LLC, Patrick Lee Reid supervises all activities of the firm. Patrick Lee Reid's contact information is on the cover page of this disclosure document. Patrick Lee Reid adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

Item 7: Requirements For State Registered Advisers

This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.

A. Patrick Lee Reid has NOT been involved in any of the events listed below.

1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.

2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.

B. Patrick Lee Reid has NOT been the subject of a bankruptcy.