

This brochure supplement provides information about Jakob Andrew Boley that supplements the PLAN2THRIVE FINANCIAL, LLC brochure. You should have received a copy of that brochure. Please contact Jakob Andrew Boley 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 Jakob Andrew Boley is also available on the SEC's website at www.adviserinfo.sec.gov.

PLAN2THRIVE FINANCIAL, LLC
Form ADV Part 2B – Individual Disclosure Brochure

for

Jakob Andrew Boley
Personal CRD Number: 7561675
Investment Adviser Representative

PLAN2THRIVE FINANCIAL, LLC
220 W Davenport St
Eldridge, IA 52748
(563) 549-9084
jakob@plan2thrivefs.com

UPDATED: 04/02/2024

Item 2: Educational Background and Business Experience

Name: Jakob Andrew Boley **Born:** 2003

Educational Background and Professional Designations:

Education:

BBA Finance, University of Iowa - 2023

Business Background:

04/2024 - Present	Investment Adviser Representative PLAN2THRIVE FINANCIAL, LLC
12/2023 - 03/2024	Associate Representative Thrivent Financial
08/2021 - 12/2023	Student University of Iowa
01/2014 - 05/2021	Student North Scott School District

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

Jakob Andrew Boley is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

Jakob Andrew Boley 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 a representative of PLAN2THRIVE FINANCIAL, LLC, Jakob Andrew Boley is supervised by Patrick Reid, the firm's Chief Compliance Officer. Patrick Reid is responsible for ensuring that Jakob Andrew Boley adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Patrick Reid is (563) 323-5790.

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. Jakob Andrew Boley 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. Jakob Andrew Boley has NOT been the subject of a bankruptcy.