

This brochure supplement provides information about Amanda Sue Kelley that supplements the Plan2Thrive Financial, LLC brochure. You should have received a copy of that brochure. Please contact Amanda Sue Kelley 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 Amanda Sue Kelley is also available on the SEC's website at www.adviserinfo.sec.gov.

Plan2Thrive Financial, LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Amanda Sue Kelley

Personal CRD Number: 7187503

Investment Adviser Representative

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

UPDATED: 02/21/2025

Item 2: Educational Background and Business Experience

Name: Amanda Sue Kelley **Born:** 1982

Educational Background and Professional Designations:

Education:

Bachelor of Business Management, Western Illinois University - 2005
Associate in Arts General, Blackhawk College - 2003

Business Background:

01/2025 - Present	Investment Adviser Representative Plan2Thrive Financial, LLC
10/2019 - 01/2025	Paraplanner Plan2Thrive Financial Services
08/2007 - 10/2019	Income Maintenance Worker II Department of Human Services

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

Amanda Sue Kelley is not engaged in any investment-related business or occupation (other than this advisory firm).

Item 5: Additional Compensation

Amanda Sue Kelley 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, Amanda Sue Kelley is supervised by Patrick Reid, the firm's Chief Compliance Officer. Patrick Reid is responsible for ensuring that Amanda Sue Kelley 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. Amanda Sue Kelley 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. Amanda Sue Kelley has been the subject of a bankruptcy:

Amanda Sue Kelley is currently the subject of a Chapter13 bankruptcy petition that was filed on 08/18/2022. Amanda Sue Kelley is expected to be discharged from this bankruptcy on 08/18/2025.