

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: 04/11/2025

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
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01/2022 - Present	Part Owner The Vault Coffee & Café LLC
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09/2021 - Present	Part Owner Plumb Line Properties LLC
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01/2017 - 12/2021	Registered Rep/IAR Plan2Thrive Financial Services
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01/2017 - 12/2021	Registered Representative LPL Financial LLC
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06/2016 - 01/2017	Investment Adviser Representative Eagle Strategies LLC
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06/2013 - 01/2017	Registered Representative NY Life Securities LLC
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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 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.