

Spencer Rose
Christensen Group Financial, LLC

**9855 West 78th Street
Suite 100
Eden Prairie, MN 55344**

**Telephone: 952-653-1000
Facsimile: 952-653-1100**

April 21, 2022

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Spencer Rose that supplements the Christensen Group Financial, LLC brochure. You should have received a copy of that brochure. Contact us at 952-653-1100 if you did not receive Christensen Group Financial, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Spencer Rose (CRD # 6430049) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Spencer Rose

Year of Birth: 1992

Formal Education After High School:

- University of Wisconsin Eau Claire, BS Economics minor in Actuarial Science, 2014

Business Background:

- Christensen Group Financial, LLC, Retirement Plan Consultant, 10/2014 - Present
- Kestra Advisory Services LLC, Asst. Retirement Plan Consultant, 6/2016 - 6/2022
- Kestra Investment Services LLC, Asst. Retirement Plan Consultant, 6/2014 - 6/2022

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Spencer Rose has no required disclosures under this item.

Item 4 Other Business Activities

Spencer Rose is separately licensed as an independent insurance agent. In this capacity, he can effect transactions in insurance products for his clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mr. Rose for insurance related activities. This presents a conflict of interest because Mr. Rose may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Spencer Rose is a landlord and property owner. Mr. Rose's duties as the landlord and property owner do not create a conflict of interest to his provision of advisory services through Christensen Group Financial, LLC.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Rose's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Christensen Group Financial, LLC's firm brochure for additional disclosures on this topic.

Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Christensen Group Financial, LLC, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Scott Lichter, Chief Compliance Officer

Supervisor phone number: 952-653-1000