

McMill Wealth Inc
125 S. 4th Street
Norfolk, NE 68701
(402) 371-1160
March 2021

This brochure supplement provides information about McMill Wealth Inc's personnel that supplements the McMill Wealth Inc brochure. You should have received a copy of the McMill Wealth Inc brochure. Please contact Nathan Raabe at (402) 371-1160 or via email at nathanr@wealthfirm.info if you did not receive the McMill Wealth Inc brochure or if you have any questions about the contents of this supplement.

Additional information about McMill Wealth Inc's personnel is available on the SEC's website at www.adviserinfo.sec.gov.

Several McMill Wealth Inc personnel have designations, which are conveyed by acronyms. Please see below for an explanation of the designations received by the firm's personnel.

Certified Financial Planner (CFP®)

In order to qualify as a Certified Financial Planner (CFP®), applicants must pass an examination in regard to financial planning prescribed by the Certified Financial Planner Board of Standards, Inc., have a bachelor's degree (or higher) from an accredited college or university, and have three years of personal financial planning experience. A specified number of continuing education hours are also required to maintain this designation.

Certified Public Accountant (CPA)

In order to qualify as a Certified Public Accountant (CPA), applicants must pass the Uniform Certified Public Accountant Examination and meet additional state education and experience requirements. A specified number of continuing education hours are also required to maintain this designation.

Certified Valuation Analyst (CVA)

In order to qualify as a Certified Valuation Analyst (CVA), applicants must pass an examination in regard to valuation services prescribed by the National Association of Certified Valuators and Analysts (NACVA), hold a valid CPA license, and be a member in good standing with NACVA. A specified number of continuing education hours are also required in order to maintain this designation.

Certified Fraud Examiner (CFE)

In order to qualify as a Certified Fraud Examiner (CFE), applicants must either pass an examination prescribed by the Association of Certified Fraud Examiners (ACFE) and/or meet certain minimum academic and professional requirements, be a member in good standing with ACFE, be of high moral character, and agree to abide by the bylaws and Code of Professional Ethics of the Association of Certified Fraud Examiners. A specified number of continuing education hours are also required in order to maintain this designation.

Personal Financial Specialist (PFS)

In order to qualify as a Personal Financial Specialist (PFS), applicants must pass an examination in regard to financial planning prescribed by the American Institute of Certified Public Accountants (AICPA), be a CPA, be a member of the AICPA in good standing, and meet experience requirements. The PFS designation is a designation that is prescribed by the AICPA and is used in conjunction with the CPA designation as CPA/PFS. A specified number of continuing education hours are also required to maintain this designation.

Qualified Plan Financial Consultant (QPFC)

In order to qualify as a Qualified Plan Financial Consultant (QPFC), applicants must pass an examination in regard to retirement planning, administration, and regulatory requirements of qualified retirement plans prescribed by the American Society of Pension Professionals & Actuaries (ASPPA), hold a Series 65 license, and meet experience requirements. A specified number of continuing education hours are also required to maintain this designation.

Certified Plan Fiduciary Advisor (CPFA)

In order to qualify as a Certified Plan Fiduciary Advisor (CPFA), applicants must pass an examination in regard to retirement planning, administration, and regulatory requirements of qualified retirement plans prescribed by the National Association of Plan Advisors. A specified number of continuing education hours are also required to maintain this designation. Current QPFC holders are grandfathered and have a choice between continuing to use the QPFC designation, or switching their designation to CPFA. QPFC credential candidates needed to have completed the requirements for that designation by the end of 2015. If they did not do so, they are required to complete the CPFA requirements in order to gain the CPFA credential.

Qualified 401(k) Administrator (QKA)

In order to qualify as a Qualified 401(k) Administrator (QKA), applicants must pass a series of examinations in regard to 401(k) administration, recordkeeping, and non-discrimination testing prescribed by the American Society of Pension Professionals & Actuaries (ASPPA), be a member of ASPPA in good standing, and meet experience requirements. A specified number of continuing education hours are also required to maintain this designation.

Exempt & Governmental Plan Consultant (TGPC)

In order to qualify as a Tax-Exempt & Governmental Plan Consultant (TGPC), applicants must pass a series of examinations in regard to the administration, sales, marketing, and regulations regarding 403(b) plans, 457 plans, and other plans maintained by governmental and tax-exempt entities prescribed by the American Society of Pension Professionals & Actuaries (ASPPA), be a member of ASPPA in good standing, and meet experience requirements. A specified number of continuing education hours are also required to maintain this designation.

Several firm personnel are also employed at other related companies, which may present a conflict of interest. Please see below for explanations of the other related companies and potential conflicts of interest.

McMill CPA PC

McMill CPA PC is a Certified Public Accounting (CPA) firm licensed with the state of Nebraska. If in the employee's capacity as an investment adviser representative with McMill Wealth Inc, the employee determines that a client is in need of tax or accounting services, the client may be referred to McMill CPA PC. In addition, if accounting or tax clients of McMill CPA PC are in need of financial planning or other advisory services, the employee, acting in his/her separate capacity as an accountant or other employee of McMill CPA PC, may refer or recommend investment advisory services available through McMill Wealth Inc.

Clients are not obligated in any manner to use the services or an accounting firm recommended by the employee. If any McMill Wealth Inc client also becomes an accounting client of McMill CPA PC, the client will be charged separately for the accounting services.

Insurance Agent

In order to obtain an Insurance Producer license in the State of Nebraska, applicants must pass an examination. A specified number of continuing education hours are required to maintain this license.

Some employees of McMill Wealth Inc are independently licensed to sell insurance and annuity products through various insurance companies. When acting in this capacity, the employee will earn commissions for selling insurance and annuity products, which commissions are received by McMill CPA PC.

The earning of commissions may affect the judgment of the employee when recommending products to clients. While the employee endeavors at all times to put the interest of his/her clients first as part of his/her overall fiduciary duty to clients, clients should be aware that the earning of commissions and earning any additional compensation itself creates a conflict of interest, and may affect his/her decision-making process when making recommendations.

Clients are never obligated or required to purchase insurance products from or through the employee and may choose any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

These insurance services and products are being offered as a convenience to the clients of McMill Wealth Inc, Wealth Management LLC, and McMill CPA PC

Retirement Plan Consultants LLC

Retirement Plan Consultants LLC (RPC) is a retirement plan service provider, which provides services as a third-party administrator (TPA), recordkeeper, and retirement plan consultant. If in the employee's capacity as an investment adviser representative with McMill Wealth Inc, the employee determines a client is in need of retirement plan consulting services, the client may be referred to Retirement Plan Consultants LLC. In addition, if retirement plan consulting clients of Retirement Plan Consultants LLC are in need of financial planning or other advisory services, the employee, acting in his/her separate capacity as a retirement plan consultant, may refer or recommend investment advisory services available through McMill Wealth Inc.

Clients are not obligated in any manner to use the services or a retirement plan consulting firm recommended by the employee. If any McMill Wealth Inc client also becomes a retirement plan consulting client of Retirement Plan Consultants LLC, the client will be charged separately for the retirement plan consulting services.

Some of the firm's personnel are registered with two Registered Investment Advisor (RIA) firms. Please see below for an explanation of the two RIA firms.

McMill Wealth Inc, formerly Christensen & Associates P.C.

McMill Wealth Inc, formerly Christensen & Associates P.C focuses on providing asset management services and financial planning services to clients. Clients that engage McMill Wealth Inc will receive a copy of the McMill Wealth Inc disclosure brochure and will execute a client agreement specifying the services provided and fees charged by McMill Wealth Inc.

Wealth Management LLC

Management LLC is owned by Wealth Management Holdings, Inc. Wealth Management Holdings, Inc. is owned by Nancy Brozek, Jared Faltys, and Nathan Raabe. Wealth Management LLC provides asset management services, financial planning services, qualified retirement plan services (referred to as "Fiduciary Services"), and backoffice services. Clients that engage Wealth Management LLC will receive a copy of the Wealth Management LLC disclosure brochure and will execute a client agreement specifying the services provided and fees charged by Wealth Management LLC.

Wealth Management Holdings, Inc.

Wealth Management LLC is owned by (holding company) corporation named Wealth Management Holdings, Inc. Wealth Management Holdings, Inc. is incorporated under the laws of the State of Nebraska. Wealth Management Holdings, Inc. is owned by Nancy Brozek, Jared Faltys, and Nathan Raabe. Wealth Management Holdings, Inc. is merely a holding company and is not registered as an investment advisor with the SEC

Nancy Jo Brozek, CPA/PFS

Item 2 – Educational Background and Business Experience

Nancy Brozek was born in 1963 and received her Bachelor of Science degree with an Emphasis in Accounting from the University of Nebraska-Lincoln in 1985. Nancy became licensed as a Certified Public Accountant (CPA) in the state of Nebraska in 1987. She earned her Personal Financial Specialist (PFS) designation in 2004.

Nancy joined McMill Wealth Inc, formerly Christensen Associates, P.C., in 1987 and currently holds the title of Vice President. She joined Wealth Management LLC in 2006 and currently holds the title of Vice President. Nancy is a Principal of McMill Wealth Inc.

Item 3 – Disciplinary Information

Nancy Brozek has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill Wealth Inc/Wealth Management LLC

Nancy Brozek is affiliated with two separate investment advisor firms. Nancy spends approximately 19% of her time on investment advisory activities with McMill Wealth Inc and Wealth Management LLC.

McMill CPA PC

Nancy Brozek is a Certified Public Accountant (CPA), President, and Principal with the firm McMill CPA PC. Nancy spends approximately 72% of her time on her activities as a CPA.

Wealth Management Holdings, Inc.

Nancy Brozek is a 47.5% shareholder, Vice-President, and Secretary with Wealth Management Holdings, Inc. Nancy spends approximately 1% of her time on this holding company activity.

Retirement Plan Consultants LLC

Nancy Brozek is a Principal with the firm Retirement Plan Consultants LLC. Nancy spends approximately 5% of her time on her activities as a retirement plan consultant.

Hoffman Construction

Nancy Brozek is an officer at Hoffman Construction. Hoffman Construction is a construction company. Nancy spends approximately 1% of her time on her duties as an officer of the company.

Sacred Heart Church

Nancy Brozek is a member of the finance committee. Nancy spends approximately 1% of her time on her activities as a member for the finance committee.

McMill, Inc.

Nancy Brozek is a 50% shareholder in McMill, Inc. McMill, Inc. owns commercial rental property. Nancy spends approximately 1% of her time on her commercial rental activities.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc and the Wealth Management LLC Form ADV Part 2A Disclosure Brochures, Nancy Brozek receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc and of Wealth Management LLC. He is responsible for developing, overseeing, and enforcing each firm's compliance programs that have been established to monitor and supervise the activities and services provided by each firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Stanley Del Christensen, CPA/PFS

Item 2 – Educational Background and Business Experience

Stan Christensen was born in 1951 and received his Associate of Arts degree from Northeastern Nebraska College (currently known as Northeast Community College) in 1972 and his Bachelor of Science degree in Business Administration with an Emphasis in Accounting from Wayne State College in 1974. Stan became licensed in the state of Nebraska as a Certified Public Accountant (CPA) in February 1976. Stan earned his Personal Financial Specialist (PFS) designation in 2000.

Stan joined McMill Wealth Inc, formerly Christensen Associates, P.C, in 1973 and currently holds the title of Wealth Advisor.

Item 3 – Disciplinary Information

Stan Christensen has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill Wealth Inc

Stan Christensen spends approximately 79% of his time on his activities as an investment advisor representative.

McMill CPA PC

Stan Christensen is a Certified Public Accountant (CPA) with the firm McMill CPA PC. Stan spends approximately 20% of his time on his activities as a CPA.

Norfolk Rotary Club

Stan Christensen is the treasurer for the Norfolk Rotary Club. The Norfolk Rotary Club is a non-profit service club. Stan spends approximately 1% of his time on his treasurer duties.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc Form ADV Part 2A Disclosure Brochure, Stan Christensen receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc. He is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Jared Matthew Faltys, CPA/PFS/CPFA

Item 2 – Educational Background and Business Experience

Jared Faltys was born in 1972 and received his Bachelor of Science degree from Nebraska Wesleyan University in 1994. Jared became licensed as a Certified Public Accountant (CPA) in the state of Nebraska in 1995. He earned his Personal Financial Specialist (PFS) designation in 2002 and his Qualified Plan Financial Consultant (QPFC) designation in 2010. His Qualified Plan Financial Consultant (QPFC) designation was converted to the Certified Plan Fiduciary Advisor (CPFA) in 2015.

Jared joined McMill Wealth Inc, formerly Christensen Associates, P.C, in 1994 and currently holds the title of President. Jared joined Wealth Management LLC in 2006 and currently holds the title of President. Jared is a Principal of McMill Wealth Inc.

Item 3 – Disciplinary Information

Jared Faltys has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Wealth Management LLC/McMill Wealth Inc

Jared Faltys is affiliated with two separate investment advisor firms. Jared spends approximately 40% of his time on investment advisory activities with McMill Wealth Inc and Wealth Management LLC.

McMill CPA PC

Jared Faltys is a Certified Public Accountant (CPA), Vice President, and Principal with the firm McMill CPA PC. Jared spends approximately 43% of his time on his activities as a CPA.

Wealth Management Holdings, Inc.

Jared Faltys is a 47.5% shareholder, President, and Treasurer with Wealth Management Holdings, Inc. Jared spends approximately 1% of his time on this holding company activity.

Insurance Agent

Jared Faltys holds an Insurance Producer license in the State of Nebraska. Jared spends approximately 10% of his time on insurance activities.

Retirement Plan Consultants LLC

Jared Faltys is a Qualified Plan Financial Consultant (QPFC) and principal with the firm Retirement Plan Consultants LLC. Jared spends approximately 5% of his time on his activities as a retirement plan consultant.

McMill, Inc.

Jared Faltys is a 50% shareholder of McMill, Inc. McMill, Inc. owns commercial rental property. Jared spends approximately 1% of his time on his commercial rental property activities.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc and the Wealth Management LLC Form ADV Part 2A Disclosure Brochures, Jared Faltys receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc and of Wealth Management LLC. He is responsible for developing, overseeing, and enforcing each firm's compliance programs that have been established to monitor and supervise the activities and services provided by each firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Danny Ray Fuerhoff, CPA

Item 2 – Educational Background and Business Experience

Danny Fuerhoff was born in 1956 and received his Bachelor of Science degree in Business Administration with an Emphasis in Accounting from Wayne State College in 1978. Danny became licensed as a Certified Public Accountant (CPA) with the state of Nebraska in March 1979.

Danny joined McMill Wealth Inc, formerly Christensen Associates, P.C, in 1977 and currently holds the position of Wealth Advisor.

Item 3 – Disciplinary Information

Danny Fuerhoff has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill Wealth Inc

Danny Fuerhoff spends approximately 9% of his time on his activities as an investment advisor representative.

McMill CPA PC

Danny Fuerhoff is a Certified Public Accountant (CPA) with the firm McMill CPA PC. Danny spends approximately 90% of his time on his activities as a CPA.

Parent to Parent Network

Danny Fuerhoff is on the board of directors and is the treasurer for the Parent to Parent Network. Parent to Parent Network is a non-profit company. Danny spends approximately 1% of this time on his activities associated with Parent to Parent Network.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc Form ADV Part 2A Disclosure Brochure, Danny Fuerhoff receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc. He is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Larry Edward Hilkemann, CPA/PFS

Item 2 – Educational Background and Business Experience

Larry Hilkemann was born in 1950 and received his Associate of Arts degree from Northeastern Nebraska College (currently known as Northeast Community College) in 1970 and his Bachelor of Science degree in Business Administration with an Emphasis in Accounting from Wayne State College in 1972. Larry became licensed in the state of Nebraska as a Certified Public Accountant (CPA) in March 1984. Larry earned his Personal Financial Specialist (PFS) designation in 2002.

Larry joined McMill Wealth Inc, formerly Christensen Associates, P.C, in 1972 and currently holds the title Wealth Advisor. Larry joined Wealth Management LLC in 2006 and currently holds the title Advisor.

Item 3 – Disciplinary Information

Larry Hilkemann has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill Wealth Inc/Wealth Management LLC

Larry Hilkemann is affiliated with two separate investment advisor firms. Larry spends approximately 58% of his time on investment advisory activities with McMill Wealth Inc and Wealth Management LLC.

McMill CPA PC

Larry Hilkemann is a Certified Public Accountant (CPA) with the firm McMill CPA PC. Larry spends approximately 30% of his time on his activities as a CPA.

Insurance Agent

Larry Hilkemann holds an Insurance Producer license in the State of Nebraska. Larry spends approximately 10% of his time on insurance activities.

Farm Land

Larry Hilkemann owns farm land and farm buildings for rental in Pierce County, Nebraska. Larry spends approximately 1% of his time on activities related to managing the farm land and building rental.

Norfolk Area Concert Association

Larry Hilkemann serves as a member of the board of directors for the Norfolk Area Concert Association. Larry spends approximately 1% of his time on his activities associated with the board of directors.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc and the Wealth Management LLC Form ADV Part 2A Disclosure Brochures, Larry Hilkemann receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc and of Wealth Management LLC. He is responsible for developing, overseeing, and enforcing each firm's compliance programs that have been established to monitor and supervise the activities and services provided by each firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Lynn Eao Laible, CPA/QKA/TGPC

Item 2 – Educational Background and Business Experience

Lynn Laible was born in 1956 and received her Bachelor of Science degree in Business Administration from the University of Nebraska-Lincoln in 1978. Lynn became licensed in the state of Nebraska as a Certified Public Accountant (CPA) in September 1978. Lynn earned her Qualified 401(k) Administrator (QKA) designation in December 2010 and her Tax-Exempt & Governmental Plan Consultant (TGPC) designation in March 2012.

Lynn joined McMill Wealth Inc, formerly Christensen Associates, P.C, in 1984 and currently holds the title of Wealth Advisor.

Item 3 – Disciplinary Information

Lynn Laible has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill Wealth Inc

Lynn Laible spends approximately 1% of her time on her activities as an investment advisor representative.

McMill CPA PC

Lynn Laible is a Certified Public Accountant (CPA) with the firm McMill CPA PC. Lynn spends approximately 89% of her time on her activities as a CPA.

Retirement Plan Consultants LLC

Lynn Laible is an Administrator with the firm Retirement Plan Consultants LLC. Lynn spends approximately 10% of her time on her activities as a retirement plan consultant.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc Form ADV Part 2A Disclosure Brochure, Lynn Laible receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc. He is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and

supervise the activities and services provided by the firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Lynette Luann Pofahl, CPA/CVA

Item 2 – Educational Background and Business Experience

Lynette Pofahl was born in 1953 and received her Bachelor of Science degree in Business Administration from the University of Texas at San Antonio in 1982. Lynette became licensed as a Certified Public Accountant (CPA) with the state of Texas in April 1985 and the state of Nebraska in December 1990. She earned her Certified Valuation Analyst (CVA) designation in February 2000.

Lynette joined McMill Wealth Inc, formerly Christensen Associates, P.C, in 1990 and currently holds the title of Wealth Advisor.

Item 3 – Disciplinary Information

Lynette Pofahl has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill Wealth Inc

Lynette Pofahl spends approximately 10% of her time on her activities as an investment advisor representative.

McMill CPA PC

Lynette Pofahl is a Certified Public Accountant (CPA) and Certified Valuation Analyst (CVA) with the firm McMill CPA PC. Lynette spends approximately 89% of her time on her activities as a CPA/CVA.

Renegade, LLC

Lynette is a 5% shareholder in Renegade, LLC. Renegade, LLC owns and operates a western wear store. Lynette spends approximately 1% of her time on her retail store activities.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc Form ADV Part 2A Disclosure Brochure, Lynette Pofahl receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc. He is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Sherri Lynn Christensen Prim, CFP®

Item 2 – Educational Background and Business Experience

Sherri Prim was born in 1971 and attended Northeast Community College from 1989 until 1990 prior to receiving her Bachelor of Arts degree in Communication Studies with an Emphasis in Public Relations from the University of Nebraska-Lincoln in 1994. She earned her Certified Financial Planner (CFP®) designation in October 2009.

Sherri joined McMill Wealth Inc, formerly Christensen Associates, P.C, in August 2002 and currently holds the title of Wealth Advisor.

Item 3 – Disciplinary Information

Sherri Prim has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill Wealth Inc

Sherri Prim spends approximately 97% of her time on her activities as an investment advisor representative.

McMill CPA PC

Sherri Prim is a Wealth Manager with the firm McMill CPA PC. Sherri spends approximately 1% of her time on her activities as a wealth manager.

Norfolk Rotary Club

Sherri Prim is the President for the Norfolk Rotary Club. The Norfolk Rotary Club is a non-profit service club. Sherri spends approximately 1% of her time on her president duties.

DISCO Properties, L.L.C.

Sherri Prim is a Member of the firm DISCO Properties, L.L.C. DISCO Properties, L.L.C. is a rental real estate company. Sherri spends approximately 1% of her time on these rental activities.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc Form ADV Part 2A Disclosure Brochure, Sherri Prim receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc. He is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Nathan Aubrey Raabe

Item 2 – Educational Background and Business Experience

Nathan (Nate) Raabe was born in 1981 and received his Bachelor of Science degree in Accounting and Business Administration from Concordia University-Seward in 2004.

Nate joined McMill Wealth Inc, formerly Christensen Associates, P.C, in July 2008 and currently holds the titles of Chief Compliance Officer, Manager and Wealth Advisor. Nate joined Wealth Management LLC in June 2011 and currently holds the titles of Chief Compliance Officer, Manager and Wealth Advisor. Nate has been employed at McMill CPA PC since November 2007 and currently holds the title of Staff Accountant.

Item 3 – Disciplinary Information

Nate Raabe has no legal or disciplinary events to report.

Item 4 – Other Business Activities

Wealth Management LLC/McMill Wealth Inc

Nate Raabe is affiliated with two separate investment advisor firms. Nate spends approximately 72% of his time on investment advisory activities with McMill Wealth Inc and Wealth Management LLC.

McMill CPA PC

Nate Raabe is a Staff Accountant with the firm McMill CPA PC. Nate spends approximately 1% of his time on his activities as an accountant.

Wealth Management Holdings, Inc.

Nate Raabe is a 5% shareholder with Wealth Management Holdings, Inc. Nate spends approximately 1% of his time on this holding company activity.

Insurance Agent

Nate Raabe holds an Insurance Producer license in the State of Nebraska. Nate spends approximately 5% of his time on insurance activities.

Retirement Plan Consultants LLC

Nate Raabe is an Investment Specialist with the firm Retirement Plan Consultants LLC. Nate spends approximately 9% of his time on his activities as a retirement plan consultant.

Humbug Investments, LLC

Nate Raabe is the sole member of Humbug Investments, LLC. Humbug Investments, LLC owns and operates apartment complexes. Nate spends approximately 10% of his time on his apartment rental activities.

Nathan and Lia Raabe Farm Land

Nate and, his spouse, Lia Raabe jointly own family pasture ground and may own livestock. Nate spends approximately 1% of his time on this pasture and livestock activity.

Small Town Investments, LLC

Nate Raabe a 33% shareholder of Small Town Investments. Small Town Investments owns a gas station in Pilger, NE. Nate spends 0% of his time on activities from Small Town Investments and is a passive member.

Providence Medical Center Board of Directors

Nate Raabe a member of the Board of Directors for Providence Medical Center. Providence. Providence Medical Center is located in Wayne, NE. Nate spends 1% of his time on activities for the board of directors for Providence Medical Center.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc and the Wealth Management LLC Form ADV Part 2A Disclosure Brochures, Nate Raabe receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc and of Wealth Management LLC. He is responsible for developing, overseeing, and enforcing each firm's compliance programs that have been established to monitor and supervise the activities and services provided by each firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Alexandra Nicolle Baumert, QKA/CPFA/TGPC

Item 2 – Educational Background and Business Experience

Alexandra (Alex) Baumert was born in 1991 and received her Bachelor of Science degree in Business Administration with an emphasis in Finance from Wayne State College in 2012 and her Masters of Science in Business Administration from the University of Nebraska at Omaha in 2014.

Alex joined McMill Wealth Inc, formerly Christensen Associates, P.C, in March 2015 and currently holds the title of Wealth Advisor. Alex joined Retirement Plan Consultants LLC in January 2013 and currently holds the title of Internal Wholesaler. Prior to this, Alex was employed as an Intern with McMill CPA PC, formerly Christensen Brozek Faltys PC, from August 2012 until December 2012. She was employed as a Bank Teller with the State National Bank & Trust from November 2010 until August 2012. Alex earned her Qualified 401(k) Administrator (QKA) designation in November 2015, her Tax-Exempt & Governmental Plan Consultant (TGPC) designation in November 2015, and her Certified Plan Fiduciary Advisor (CPFA) designation in December 2015.

Item 3 – Disciplinary Information

Alex Baumert has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill Wealth Inc

Alex Baumert spends approximately 1% of her time on her activities as an investment advisor representative.

Retirement Plan Consultants LLC

Alex Baumert is an Internal Wholesaler with the firm Retirement Plan Consultants LLC. Alex spends approximately 98% of her time on her activities as an Internal Wholesaler.

Pierce Area Recreational Soccer

Alex Baumert is referee with Pierce Area Recreational Soccer. She spends approximately 1% of her time as a soccer referee.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc Form ADV Part 2A Disclosure Brochure, Alex Baumert receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc. He is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Kyle Andrew Koester

Item 2 – Educational Background and Business Experience

Kyle Koester was born in 1992 and received his Bachelor of Science degree in Economics and Finance from Wayne State College in 2014.

Kyle joined McMill Wealth Inc, formerly Christensen Associates, P.C, in April 2015 and currently holds the title of Wealth Advisor. Prior to this, Kyle was employed as an Intern with McMill CPA PC, Christensen Brozek Faltys PC, from January 2013 until December 2013. He became employed by Wealth Management LLC in January 2014 and continues to be involved in investment backoffice activities. He was employed as a desk worker with Wayne State College from August 2011 until May 2012 and as an Assistant Groundskeeper with Laurel-Concord Public Schools from May 2011 until August 2012.

Item 3 – Disciplinary Information

Kyle Koester has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill Wealth Inc

Kyle Koester spends approximately 5% of his time on his activities as an investment advisor representative.

Wealth Management LLC

Kyle Koester spends approximately 95% of his time on investment backoffice activities.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc Form ADV Part 2A Disclosure Brochure, Kyle Koester receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc. He is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Clint Andrew Weeder, CPA

Item 2 – Educational Background and Business Experience

Clint Weeder was born in 1984 and received his Bachelor of Science degree in Business Administration and Finance from the Midland University in 2007. Clint became licensed as a Certified Public Accountant (CPA) with the state of Nebraska in June 2008.

Clint joined McMill Wealth Inc, formerly Christensen Associates, P.C, in January 2016 and currently holds the title of Wealth Advisor. Clint has been employed at McMill CPA PC since January 2016 and currently holds the title of Principal and CPA. Prior to this, Clint was employed at ACI Worldwide, INC. from December 2013 until December 2015 and at Deloitte Tax, LLC from June 2007 until December 2013.

Item 3 – Disciplinary Information

Clint Weeder has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill Wealth Inc

Clint Weeder spends approximately 20% of his time on his activities as an investment advisor representative.

McMill CPA PC

Clint is a Certified Public Accountant (CPA) and Principal with the firm McMill CPA PC. Clint spends approximately 80% of his time on his activities as a CPA.

St. Joseph's Parish

Clint Weeder spends approximately 1% of his time on his activities as vice president of council.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc Form ADV Part 2A Disclosure Brochure, Clint Weeder receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc. He is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Andrew John Steffensmeier, CPA/CFE

Item 2 – Educational Background and Business Experience

Andrew Steffensmeier was born in 1990 and received his Bachelor of Science degree in Business Administration from the University of Nebraska at Lincoln in 2012 and his Masters Degree in Public Accountancy from the University of Nebraska at Lincoln in 2013. Andrew became licensed as a Certified Public Accountant (CPA) with the state of Nebraska in July 2016. He earned his Certified Fraud Examiner (CFE) designation in May 2013.

Andrew joined McMill Wealth Inc, formerly Christensen Associates, P.C, in 2016 and currently holds the title of Wealth Advisor. Andrew has been employed at McMill CPA PC since November 2013 and currently holds the title of CPA/CFE. Prior to this, Andrew was employed at Union Bank & Trust Company from November 2011 until November 2013 and at Kidwell Companies as an electrician from May 2011 until August 2011.

Item 3 – Disciplinary Information

Andrew Steffensmeier has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill Wealth Inc

Andrew Steffensmeier spends approximately 8% of his time on his activities as an investment advisor representative.

McMill CPA PC

Andrew Steffensmeier is a Certified Public Accountant (CPA) and Certified Fraud Examiner (CFE) with the firm McMill CPA PC. Andrew spends approximately 90% of his time on his activities as a CPA/CFE.

Norfolk Area Community Foundation Fund

Andrew Steffensmeier is board member with the Norfolk Area Community Foundation Fund which provides charitable services. He spends approximately 1% of his time on his activities as a board member.

Norfolk Area Chamber of Commerce

Andrew Steffensmeier is on the budget committee for the Norfolk Area Chamber of Commerce, which is a non-profit company. He spends approximately 1% of his time on his activities associated with the budget committee.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc Form ADV Part 2A Disclosure Brochure, Andrew Steffensmeier receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc. He is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Michael Scott Carlson, CFP®/ChFC®/CPA

Item 2 – Educational Background and Business Experience

Michael Carlson was born in 1964 and received his Bachelor of Science degree in Accounting and Information Systems from Drake University in 1986 and his Masters Degree in Business Administration from the University of Notre Dame in 1987. He earned his Certified Financial Planner (CFP®) designation in September 2014 and his Certified Financial Consultant (ChFC®) designation in March 2015. He is also a licensed Certified Public Accountant in the state of Illinois since September 2016. Michael earned his Personal Financial Specialist (PFS) in April 2019 and his EA, enrolled agent designation in July 2018.

Michael joined McMill Wealth Inc, formerly Christensen Associates, P.C, in 2017 and currently holds the title of Wealth Advisor. Michael has been employed at Wealth Management LLC since April 2017 and currently holds the title of Manager of Sales. Prior to this, Michael was employed at Securities America Inc from April 2015 until April 2017 and at MetLife Securities Inc from May 2011 until April 2015. Michael is self-employed with MSC Goal Achievement Services from February 2010 to the present.

Item 3 – Disciplinary Information

Michael Carlson has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill Wealth Inc

Michael Carlson spends approximately 5% of his time on his activities as an investment advisor representative.

Wealth Management LLC

Michael Carlson spends approximately 90% of his time on his activities as Manager of Wealth Management Sales.

MSC Goal Achievement Services

Michael Carlson spends approximately 3% of this time on his activities as owner.

Center Sphere

Michael Carlson is the chapter vice president for Center Sphere, which is a Network of business professionals. He spends approximately 1% of his time on his activities associated with the chapter vice president activities

Insurance Agent

Michael Carlson holds an Insurance Producer license in the State of Nebraska. Mike spends approximately 1% of his time on insurance activities.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc Form ADV Part 2A Disclosure Brochure, Michael Carlson receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc. He is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Lynndsy J. Beckmann

Lynndsy Beckmann was born in 1992 and received her Bachelor of Science degree in Accounting from Wayne State College in 2015.

Lynndsy joined McMill CPA & Advisors, in 2015 and currently holds the title of CPA and Wealth Advisor. Prior to this, Lynndsy was employed at Elkhorn Valley Bank & Trust as a teller.

Item 3 – Disciplinary Information

Lynndsy Beckmann has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill Wealth Inc.

Lynndsy spends approximately 1% of her time on her activities as an investment advisor representative.

McMill CPA PC

Lynndsy spends approximately 99% of her time on her activities as CPA.

Item 5 – Additional Compensation

Other than the fees detailed in the CBF Wealth Management Form ADV Part 2A Disclosure Brochure, Lynndsy receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of CBF Wealth Management. He is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.

Melissa S. Holan

Item 2 – Educational Background and Business Experience

Melissa was born in 1980. She graduated from Northeast Community College with her Associates of Arts in Public Accounting in 2000. Melissa graduated from Wayne State College in 2004 with a Bachelor of Science in public accounting with a minor in management information systems.

Melissa joined McMill CPA & Advisors, in 2006 and currently holds the title of CPA and Wealth Advisor.

Item 3 – Disciplinary Information

Melissa Holan has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill CPA PC

Melissa began her activities as a CPA with McMill CPA PC in January 2006.

Pierce P.A.T.S

Melissa began her activities as treasurer of Pierce P.A.T.S in August of 2017.

Women Embracing Business

Melissa began her activities on the finance committee of the Women's Division of Chamber in December of 2017.

Item 5 – Additional Compensation

Other than the fees detailed in the CBF Wealth Management Form ADV Part 2A Disclosure Brochure, Melissa receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of CBF Wealth Management. He is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Nathan Raabe can be contacted at 402-371-1160

Thomas J. Pohlen

Item 2 – Educational Background and Business Experience

Tom Pohlen was born in 1986 and received his Bachelor of Science degree in Finance from the California State University, Fullerton in 2011.

Tom joined McMill Wealth Inc, formerly Christensen Associates, P.C, in 2020 and currently holds the title of Wealth Advisor. Tom has been employed at Retirement Plan Consultants since March 2019 and currently holds the title of Regional Director. Prior to this, Tom was employed at Index Fund Advisors, Inc. from January 2018 until March 2019.

Item 3 – Disciplinary Information

Thomas Pohlen has no legal or disciplinary events to report.

Item 4 – Other Business Activities

McMill Wealth Inc

Thomas Pohlen spends approximately 5% of his time on his activities as an investment advisor representative.

Retirement Plan Consultants

Thomas spends approximately 90% of his time on his activities as Regional Director.

Item 5 – Additional Compensation

Other than the fees detailed in the McMill Wealth Inc Form ADV Part 2A Disclosure Brochure, Thomas Allen receives no other compensation related to advisory services provided to clients.

Item 6 – Supervision

Nathan Raabe is the Chief Compliance Officer of McMill Wealth Inc. He is responsible for developing, overseeing, and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. Nathan Raabe can be contacted at 402-371-1160.