

**Form ADV Part 2B – Brochure Supplement**  
**for**  
**Levi Calhoun**  
**Financial Planner & Wealth Manager**  
**Effective: June 20, 2024**

This brochure supplement provides information about Levi Calhoun that supplements the first Outlier Financial Partners, LLC brochure. A copy of that brochure precedes this supplement. Please contact Levi Calhoun if the Outlier Financial Partners brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Levi Calhoun is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) which can be found using the identification number 7729212.

Outlier Financial Partners, LLC  
133 W Concho Ave, Suite 207 | San Angelo, TX 76903  
325-223-2800  
[OutlierFinancialPartners.com](http://OutlierFinancialPartners.com)

## Item 2: Educational Background and Business Experience

Levi Calhoun was born in 1983.

### **Educational Background:**

- 2023 – Series 65 (NASAA Investment Adviser Law Examination)
- 2014 – Texas - SML Mortgage Loan Originator education and examination
- 2007 – BBA in Finance (with Real Estate Option) from Angelo State University

### **Business Experience:**

- 06/2024 – Present, Financial Planner & Wealth Manager, Outlier Financial Partners, LLC
- 11/2023 – Present, CFO, Outlier Financial Partners, LLC
- 04/2023 – 06/2024, Financial Planner & Wealth Manager, Owen Financial Planning, LLC
- 07/2020 – Present, Branch Manager & Mortgage Loan Originator, Geneva Financial, LLC
- 04/2019 – 07/2020, Branch Manager & Mortgage Loan Originator, LeaderOne Financial Corp.

### **Professional Designations, Licensing & Exams:**

- Investment Adviser Representative, Series 65 - Uniform Investment Adviser Law Exam in 2023
- Mortgage Loan Originator NMLS 1174441 (TX & TN), SAFE MLO Uniform State Test in 2014

## Item 3: Disciplinary Information

There is no disciplinary information to report.

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#### Item 4: Other Business Activities

Levi Calhoun is currently employed full-time (40 hours per week) as a Branch Manager & Mortgage Loan Originator at Geneva Financial, LLC.

#### Item 5: Additional Compensation

No person, company, or organization, (other than clients) provides an economic benefit to Levi Calhoun for providing advisory services.

#### 6: Supervision

Levi Calhoun, the CFO, is a Financial Planner and Wealth Manager of Outlier Financial Partners, LLC. He is supervised by Justin Owen, the CEO and Chief Compliance Officer. Justin Owen may be contacted by phone at (325) 223-2800 or by email at Justin@OutlierFinancialPartners.com.

#### Item 7: Requirements for State Registered Advisers:

Levi Calhoun has not been involved in an arbitration, civil proceeding, self-regulatory proceeding, administrative proceeding, or a bankruptcy petition.