

## Item 1- Cover Page

### **LARRY K. WEST, CFP®, MBA, EA**



### **LONGVIEW FINANCIAL ADVISORS, INC.**

**220B Rhett Ave., Huntsville, AL 35801      &      110 Bay Street, Gadsden, AL 35901**  
**[256-534-1196]**

**This Brochure Supplement provides information about Larry West that supplements the Longview Financial Advisors, Inc. Brochure. You should have received a copy of that Brochure. Please contact Debbie Wright at 256-534-1196 if you did not receive Longview Financial Advisors, Inc.'s Brochure or if you have any questions about the contents of this supplement.**

## Item 2- Educational Background and Business Experience

Year of Birth: 1941

### *Formal Education After High School:*

- Louisiana Polytechnic University, Ruston, LA, Bachelor of Science in Mathematics, 1965
- California State University, Domingues Hills, CA, Masters in Business Administration, 1978
- CFP Professional Education Program from the National Endowment for Financial Education, Denver, CO, 1996
- Enrolled Agent preparation course earning the Enrolled Agent (EA) designation by the Internal Revenue Service, 1997

*Examinations/Associations:*

- CERTIFIED FINANCIAL PLANNER™ Exam, 1996
- Member, National Association of Personal Financial Advisors, 1997 to present
- NAPFA (National Association of Personal Financial Advisors) Registered Financial Advisor, August 1999 to present
- Enrolled Agent (EA) designation by the Internal Revenue Service, 1997
  - Authorized to represent clients to the IRS

*[See PROFESSIONAL DESIGNATIONS - MINIMUM QUALIFICATIONS REQUIRED FOR EACH DESIGNATION]*

*Business Background:*

- Chairman of the Board, Longview Financial Advisors, Inc., 2010 to present
- President, West Financial Consulting, Inc., 2001 - 2009
- West Financial Consulting, President & Sole Proprietor, 1994 - 2001
- Director of Business for McDonnell Douglas, Huntsville Division, 1990 - 1993
- Senior Manager for Subcontracts, McDonnell Douglas Delta Launch Vehicles, 1986 - 1990
- Air Force Officer, Negotiated contracts for Satellite and Space Launch Vehicles, 1966-1986

### **Item 3- Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

There are NO legal or disciplinary events against Larry.

### **Item 4- Other Business Activities**

Larry is not involved in any business that would create a conflict of interest with his duties at LONGVIEW.

### **Item 5- Additional Compensation**

Larry does not receive any special compensation that would deter him from focusing his efforts on the best interest of the client.

### **Item 6 - Supervision**

Larry acts as the backup to Jeff Cedarholm's function as Chief Investment Officer during his absence. Jeff and Larry coordinate on investment strategy. Jeff reviews any investment decisions that Larry makes. The Chief Investment Officer, Jeffrey Cedarholm, (110 Bay Street, Gadsden, AL – 256-534-1196) is responsible for selecting, approving and directing all investments and trades. He also prepares economic situation and investment material that is presented to clients by Larry.

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**JEFFREY R. CEDARHOLM, CFP®, ChFC®, CLU®**



**LONGVIEW FINANCIAL ADVISORS, INC.**

**220B Rhett Ave., Huntsville, AL 35801 & 110 Bay Street, Gadsden, AL 35901**  
**[256-534-1196]**

**This Brochure Supplement provides information about Jeffrey Cedarholm that supplements the Longview Financial Advisors, Inc. Brochure. You should have received a copy of that Brochure. Please contact Debbie Wright at 256-534-1196 if you did not receive Longview Financial Advisors, Inc.'s Brochure or if you have any questions about the contents of this supplement.**

## Item 2- Educational Background and Business Experience

Year of Birth: 1952

Educational Background:

*Formal Education After High School:*

- Washington & Lee University, Bachelor of Science, Geology, 1974
- College of Financial Planning, 2000
- The American College, Chartered Financial Consultant (ChFC®), 2002
- The American College, Chartered Life Underwriter (CLU®), 2003

*Examinations/Associations:*

- CERTIFIED FINANCIAL PLANNER™ Exam, 2000
- NASD Series 65, Uniform Investment Adviser Law Exam, March 2000
- Member, Financial Planning Association, August 1999 to present
- NAPFA (National Association of Personal Financial Advisors) Registered Financial Advisor, August 1999 to present

**[See PROFESSIONAL DESIGNATIONS - MINIMUM QUALIFICATIONS REQUIRED FOR EACH DESIGNATION]**

*Business Background:*

- President and Chief Investment Officer, Longview Financial Advisors, Inc. 2010 to present
- President, Longview Financial Advisors, LLC, 2008 - 2009
- Owner, Cedarholm & Eugenias, LLC, 2003 - 2008
- President, Cedarholm Advisors, 2000 – 2003
- Owner, Cedar Properties, 1981 to present (rental real estate)
- Owner and Manager, ESI Metals Corporation, 1974 - 1999
- Owner, Cedar II, Inc., (Equipment Leasing Company), 1984 – 1999

### **Item 3- Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

There are NO legal or disciplinary events against Jeffrey Cedarholm.

### **Item 4- Other Business Activities**

Jeffrey is not involved in any business that would create a conflict of interest with his duties at LONGVIEW.

### **Item 5- Additional Compensation**

Jeffrey does not receive any special compensation that would deter him from focusing his efforts on the best interest of the client.

### **Item 6 - Supervision**

As President and Chief Investment Officer of the firm, he is responsible for selecting & approving all investments, making all trades, and preparing economic and investment presentations to clients. His activities are monitored by the Chief Compliance Officer and the Chairman of the Board, Larry West, (220 B Rhett Ave, Huntsville, AL 35901 – 256-534-1196) by implementation of the company’s compliance policies and procedures.

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**JESSICA F. HOVIS, CFP®, CLU®**



**LONGVIEW FINANCIAL ADVISORS, INC.**

**220B Rhett Ave., Huntsville, AL 35801      &      110 Bay Street, Gadsden, AL 35901**  
**[256-534-1196]**

**This Brochure Supplement provides information about Jessica F. Hovis that supplements the Longview Financial Advisors, Inc. Brochure. You should have received a copy of that Brochure. Please contact Debbie Wright at 256-534-1196 if you did not receive Longview Financial Advisors, Inc.'s Brochure or if you have any questions about the contents of this supplement.**

## Item 2- Educational Background and Business Experience

Year of Birth: 1982

*Formal Education After High School:*

- University of Alabama, B.S., Human Environmental Science with emphasis on financial planning, 2005
- Income Tax Course, H&R Block, 2005
- Certified Mutual Fund Counselor program from College for Financial Planning, Denver, CO, 2007
- The American College, Chartered Life Underwriter (CLU®), 2008

*Examinations/Associations:*

- CERTIFIED FINANCIAL PLANNER™ Exam, 2006
- NAPFA Registered Financial Advisor, National Association of Personal Financial Advisors, January 2008 to present
- Chartered Life Underwriter™, 2008
- South Region Board Member and South Region Scholarship Chairman of the National Association of Personal Financial Advisors, 2009 to present

*Business Background*

- Financial Planner, Longview Financial Advisors, Inc., 2010 to present
- Financial Planner, West Financial Consulting, Inc., 2005-2009
- Conducts financial planning presentations to University of Alabama, Huntsville students and other organizations, such as Osher Lifetime Learning Institution.

*[See PROFESSIONAL DESIGNATIONS - MINIMUM QUALIFICATIONS REQUIRED FOR EACH DESIGNATION]*

### **Item 3- Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

There are NO legal or disciplinary events against Jessica.

### **Item 4- Other Business Activities**

Jessica is not involved in any business that would create a conflict of interest with her duties at LONGVIEW.

### **Item 5- Additional Compensation**

Jessica does not receive any special compensation that would deter her from focusing her efforts on the best interest of the client.

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### **Item 6 - Supervision**

As the lead financial planner of the firm, Jessica does not give direct investment advice for clients. However, she does provide investment status of accounts to clients. Jeffrey Cedarholm, President and Chief Investment Officer, (110 Bay Street, Gadsden, AL 35901) is her direct supervisor and provides investment information to be provided to clients.

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### CHARLES WESLEY “WES” JOHNSON, M.S.



### LONGVIEW FINANCIAL ADVISORS, INC.

220B Rhett Ave., Huntsville, AL 35801      &      110 Bay Street, Gadsden, AL 35901  
[256-534-1196]

**This Brochure Supplement provides information about Wes Johnson that supplements the Longview Financial Advisors, Inc. Brochure. You should have received a copy of that Brochure. Please contact Debbie Wright at 256-534-1196 if you did not receive Longview Financial Advisors, Inc.’s Brochure or if you have any questions about the contents of this supplement.**

## Item 2- Educational Background and Business Experience

Year of Birth: 1983

#### *Formal Education After High School:*

- Jacksonville State University, B.S., Economics, 2005
- University of Alabama, Masters in Financial Planning, 2006
- University of Alabama, enrolled in Master of Business Administration program, 2010 to present

#### **CERTIFICATIONS AND ASSOCIATIONS:**

- Corporate Member of the National Association of Personal Financial Advisors (NAPFA)

*[See PROFESSIONAL DESIGNATIONS - MINIMUM QUALIFICATIONS REQUIRED FOR EACH DESIGNATION]*

## **BUSINESS EXPERIENCE:**

- Longview Financial Advisors, Inc. 2010 to present
- Longview Financial Advisors, LLC 2008 - 2009
- Cedarholm & Eugenias, LLC 2006 – 2008
- President of Charles and Lisa Johnson Memorial Foundation, 2003 to present

### **Item 3- Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

There are NO legal or disciplinary events against Wes.

### **Item 4- Other Business Activities**

Wes is not involved in any business that would create a conflict of interest with his duties at LONGVIEW.

### **Item 5- Additional Compensation**

Wes does not receive any special compensation that would deter him from focusing his efforts on the best interest of the client.

### **Item 6 - Supervision**

Wes does not give direct advice to clients but conducts research in support of LONGVIEW's investment team. He also effects trades under the direction of Jeffrey Cedarholm, President and Chief Investment Officer, (110 Bay Street, Gadsden, AL 35901 – 256-534-1196).

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**MITCHELL F. MARSDEN, B.S.**



**LONGVIEW FINANCIAL ADVISORS, INC.**

**220B Rhett Ave., Huntsville, AL 35801 & 110 Bay Street, Gadsden, AL 35901**

**[256-534-1196]**

**This Brochure Supplement provides information about Mitch Marsden that supplements the Longview Financial Advisors, Inc. Brochure. You should have received a copy of that Brochure. Please contact Debbie Wright at 256-534-1196 if you did not receive Longview Financial Advisors, Inc.'s Brochure or if you have any questions about the contents of this supplement.**

## Item 2- Educational Background and Business Experience

Year of Birth: 1986

*Formal Education After High School:*

- University of Utah, B.S., Consumer & Community Studies, Certified Financial Planning Emphasis, 2010

*Examinations/Associations:*

- CERTIFIED FINANCIAL PLANNER™ Exam, 2010
- Corporate member of the National Association of Personal Financial Advisors, (NAPFA)

*[See PROFESSIONAL DESIGNATIONS - MINIMUM QUALIFICATIONS REQUIRED FOR EACH DESIGNATION]*

*Business Background*

- Research Assistant, University of Utah, 2009 - 2010
- Legal Assistant, McKay Marsden, Esq., LLC, 2007 – 2010
- Accounting Clerk and HR Assistant, FutureVision Technologies, 2008-2009

**Item 3- Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice.

There are NO legal or disciplinary events against Mitch.

**Item 4- Other Business Activities**

Mitch is not involved in any business that would create a conflict of interest with his duties at LONGVIEW.

**Item 5- Additional Compensation**

Mitch does not receive any special compensation that would deter him from focusing his efforts on the best interest of the client.

**Item 6 - Supervision**

As a financial planner of the firm, Mitch does not give direct investment advice to clients. However, he does provide investment status of accounts to clients. Jeffrey Cedarholm, President and Chief Investment Officer, (110 Bay Street, Gadsden, AL 35901) is his direct supervisor and provides investment information to be provided to clients.