



**INDEPENDENT FINANCIAL GROUP, LLC
INVESTMENT ADVISORY SERVICES**

FORM ADV PART II B: BROCHURE SUPPLEMENT

For

Adam Blake Bonner

This brochure supplement provides information about Blake Bonner, an Investment Advisor Representative (“IAR”) of Independent Financial Group, LLC (“IFG”). This information supplements the IFG Form ADV Part 2A Firm, Wrap Program or Retirement Plan Services Brochure. You should have received a copy of one of these brochures. You may contact the Compliance Department if you did not receive a brochure or if you have any questions concerning the contents of this supplement at 858-436-3180 or email us at compliance@ifgsd.com. Additional information about Blake Bonner is available on the Securities and Exchange Commission’s website at www.adviserinfo.sec.gov.

A. Blake Bonner
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INDEPENDENT FINANCIAL GROUP, LLC

12671 High Bluff Drive, Suite 200
San Diego, CA 92130
858-436-3180

December 22, 2021

Item 2: Educational Background and Business Experience

Blake Bonner was born in 1989.

Formal Education after High School

Blake Bonner received a Master of Science degree in Personal Financial Planning from Texas Tech University in 2014.

Blake Bonner received a Bachelor of Science degree in Personal Financial Planning, Minor in Business from Texas Tech University in 2014.

Business Experience

Blake Bonner joined IFG as an Investment Adviser Representative (IAR) in 2019. Prior to IFG, Blake Bonner worked at LPL Financial as an IAR from 2017-2019 and at United Capital Financial Advisers as an IAR from 2015-2017.

Professional Designations

Blake Bonner holds the following professional designations:

CFP® or Certified Financial Planner – In order to receive the CFP® designation an individual must satisfy an educational and experience requirement, successfully complete a CFP-board registered program (or be waived from the program due to another approved designation) and satisfy 30 hours of continuing education every two years. For additional information, refer to the CFP's website at www.cfp.net.

Item 3: Disciplinary Information

IAR Blake Bonner has disclosable event(s). Details can be found on FINRA BrokerCheck at <https://brokercheck.finra.org/>. A printed copy of the events is available upon request.

Item 4: Other Business Activities

a) The IAR is engaged in the following **investment-related** business activities:

1. Blake Bonner is a Registered Representative (RR) of IFG, a registered broker/dealer and member of the Financial Industry Regulatory Authority ("FINRA"). RR is licensed to sell securities and securities-related products through IFG and receives transaction-based commissions. This creates an inherent conflict of interest when working with clients to either provide commission-based products as a RR or advisory based products as an IAR. Please note that you are under no obligation to purchase or sell commission-based products through Blake Bonner. If you elect to open a commission-based account through IFG, disclosure will be made regarding the nature of the relationship, services offered, and compensation received at the time the account is established.
2. Blake Bonner is licensed as an insurance agent and offers fixed and variable life insurance products for commission-based compensation. As an agent Blake Bonner also receives other compensation such as - fixed or variable life renewals from insurance carriers. Being an agent of an insurance company inherently causes a conflict of interest. As an agent, Blake Bonner represents the insurance company, which precludes Blake Bonner from being a fiduciary to you in that transaction. It is important when selecting between available commission-based products or advisory based products to ask how Blake Bonner will be compensated for that insurance product/transaction. When acting as an IAR Blake Bonner has an inherent fiduciary obligation to serve your best interest. Please note that you are under no obligation to purchase insurance products through Blake Bonner. If you

elect to purchase insurance through Blake Bonner, at or before the time of the transaction, disclosures are made regarding the nature of the relationship, services offered, and compensation received.

Item 5: Additional Compensation

At times, an IAR will receive non-cash compensation from product sponsors as permitted by industry rules. For example, product sponsors may reimburse up to 100% of the cost of due diligence, training, and education/joint marketing meetings. In addition, product sponsors may invite an IAR to attend seminars, conferences and/or entertainment events at little or no cost.

An IAR of IFG may also receive compensation for referring a client to another Registered Investment Adviser for account management. The RIA may pay a fee for the referral (solicitation fee). In certain cases, the IAR will serve as the RR on the assets managed by the third-party RIA. In this instance, the IAR will receive compensation (e.g., commissions, 12b-1 fees, trails) for the purchase of the investments in addition to the referral fee paid by the third-party advisor.

Item 6: Supervision

Blake Bonner is supervised by Richard Mireles, V.P. Supervision, at 858-436-3180. The Supervision Department's responsibilities include: review and approval of advisor's transactions, regular review of correspondence and review of client documentation such as account forms, advisory agreements and Investment Policy Statements. The supervisor or his designee will conduct this supervision by using daily trade reports, blotters, compliance reports and other back-office systems provided by IFG. The supervisor or his designee also reviews inspection reports of the IAR's business practices as conducted by IFG's Compliance Department to monitor if IAR is adhering to IFG's Code of Ethics.



**INDEPENDENT FINANCIAL GROUP, LLC
INVESTMENT ADVISORY SERVICES**

FORM ADV PART II B: BROCHURE SUPPLEMENT

For

William H. Bryant

This brochure supplement provides information on William Bryant, an Investment Advisor Representative (“IAR”) of Independent Financial Group, LLC (“IFG”). This information supplements the IFG Form ADV Part 2A Firm Brochure or Wrap Program Brochure. You should have received a copy of one of these IFG brochures. Please contact the Compliance Department if you did not receive IFG’s brochure or if you have any questions concerning the contents of this supplement at 858-436-3180 or email us at disclosures@ifgsd.com. Additional information about William Bryant is available on the SEC’s website at www.adviserinfo.sec.gov.

William Bryant
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May 8, 2021

Item 2: Educational Background and Business Experience

William Bryant was born in 1962.

Formal Education after High School

William Bryant received a Bachelor of Science degree in Petroleum Engineering from Texas Tech University.

Business Background

William Bryant joined IFG as an Investment Adviser Representative (IAR) in 2019. Prior to IFG, William Bryant worked with LPL Financial as an IAR from 2009-2019.

Item 3: Disciplinary Information

There are no legal or disciplinary events to disclose.

Item 4: Other Business Activities

a) The IAR is engaged in the following **investment-related** business activities:

1. William Bryant is a registered representative of IFG, a registered broker/dealer and member of the Financial Industry Regulatory Authority (“FINRA”). As such, IAR may sell securities through IFG and receive normal and customary commissions as a result of such transactions. IAR may also receive other compensation such as mutual fund 12b-1 fees and variable annuity trails from product sponsors. Therefore, the IAR has a financial incentive to recommend securities based on the compensation to be received rather than on the client’s needs. The client is under no obligation to buy or sell securities through IAR. To the extent client does elect to open a brokerage account through IFG, disclosure is made as to the nature of the relationship, services and any compensation to be received by the registered representative at the time the account is established.
2. William Bryant is also licensed as an insurance agent and may offer fixed and variable life insurance products for typical commissions as a result of such transactions. IAR may also receive other compensation such as fixed or variable life renewals from insurance carriers. Therefore, the IAR has a financial incentive to recommend insurance based on the compensation to be received rather than on the client’s needs. The client is under no obligation to purchase insurance through IAR. To the extent client does elect to purchase insurance through IAR, disclosure is made as to the nature of the relationship, services and any compensation to be received by the registered representative at the time of the transaction.

Item 5: Additional Compensation

William Bryant may receive cash and non-cash compensation from certain third party product sponsors as permitted by industry rules. For example, product sponsors and other companies may reimburse IAR up to 100% of the cost of due diligence, training and education/joint marketing meetings. In addition, sales by IARs may qualify them for additional compensation that may include support for their business activities, attendance at seminar, conferences and entertainment.

William Bryant may also receive compensation from third party investment advisors for referring client accounts to the third party for account management. The third party will pay the IAR a solicitation fee for the referral. The IAR may also serve as the registered representative of record on the assets managed by the third party investment advisor. When this is the case, the IAR will receive normal and customary compensation (e.g., commissions, 12b-1 fees, trails) for the purchase of the investments. This compensation is in addition to the referral fee paid by the third party advisor.

Item 6: Supervision

William Bryant is supervised by Richard Mireles, V.P. Supervision, at 858-597-1980. The Supervision Department's responsibilities include: review and approval of advisor's transactions, regular review of correspondence and review of client documentation such as account forms, advisory agreements and Investment Policy Statements. The supervisor or his designee will conduct this supervision by using daily trade reports, blotters, compliance reports and other back-office systems provided by IFG. The supervisor or his designee also reviews inspection reports of the IAR's business practices as conducted by IFG's Compliance Department to monitor if IAR is adhering to IFG's Code of Ethics.