

*This brochure supplement provides information about Kelly T. Landry that supplements the CreativeOne Wealth, LLC brochure. You should have received a copy of that brochure. Please contact J.P. Rankin at 913-402-2175 if you did not receive CreativeOne Wealth, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Kelly T. Landry is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **CreativeOne WealthLLC**

### **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

### **Kelly T. Landry**

Personal CRD Number: 3236663

Investment Adviser Representative

CreativeOne Wealth LLC  
6330 Sprint Pkwy, Suite 400  
Overland Park, KS 66211  
877.883.3561 (P)

UPDATED: 5/6/2022

## Item 2: Educational Background and Business Experience

**Name:** Kelly T. Landry

**Born:** 1968

### **Education:**

Ms. Landry received a B.A. degree in Management-Entrepreneurship from Northcentral University. She also attended The American College and achieved her ChFC designation.

### **Business Background:**

07/2018 - Present	Investment Advisor Representative CreativeOne Wealth LLC
01/2020 - Present	Owner & Agent CONA Wealth, Inc.
07/2018 - 01/2020	Owner & Agent CONA Wealth
01/2014 - 08/2018	Investment Advisor Representative CONA Investment Advisors, LLC
01/2010 - 01/2013	Investment Advisor Representative Capital Financial Services
08/2007 - 12/2009	Investment Advisor Representative Transamerica Financial

### **Professional Designations:**

03/2019 - Present	Chartered Financial Consultant®, ChFC®
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The ChFC® is offered by The American College of Financial Services® (“The College”). Once The College awards a designation, that designee has a “right to use” the designation mark, provided all ongoing recertification requirements through the Professional Recertification Program are met.

To receive the ChFC® designation, you must successfully complete all required courses, meet experience requirements and ethics standards, and agree to comply with The American College Code of Ethics and Procedures.

- Education & Examination: Must successfully complete all eight courses and exams.
- Experience - Three years of full-time business experience is required for all Huebner School designations. The three-year period must be within the five years preceding the date of the award. An undergraduate or graduate degree from an accredited educational institution qualifies as one year of business experience. Part-time qualifying business experience is credited toward the three-year requirement on an hourly basis, with 2,000 hours representing the equivalent of one year full-time experience.
- Ethics: All ChFC® holders must abide by the Professional Pledge: “In all my professional relationships, I pledge myself to the following rule of ethical conduct: I shall, in light of all conditions surrounding those I serve, which I shall make every conscientious effort to ascertain and understand, render that service which, in the same circumstances, I would apply to myself.”

Individuals who wish to maintain their ChFC® designation must satisfy the recertification requirements set by the Professional Achievement in Continuing Education (“PACE”). The College requires designees to:

- Recertify their knowledge with 30 hours continuing education (CE) every two years which must include at least one hour of ethics.
- Recommit to The American College of Financial Services standard of ethics
- Reconfirm client-facing status annually
- Update contact information annually

Pay an annual program Fee of \$125 (client facing) or \$50 (non-client facing)

### **Item 3: Disciplinary Information**

Kelly T. Landry does not have any material disciplinary history.

Additional information about Ms. Landry may be found on the SEC’s Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) or at the FINRA’s Broker Check website at [www.brokercheck.finra.org](http://www.brokercheck.finra.org).

### **Item 4: Other Business Activities**

Kelly T. Landry is a licensed insurance agent and a real estate broker. From time to time, Ms. Landry may offer clients advice and/or products from this activity. Clients should be aware that these services may pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. CreativeOne Wealth LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients.

Clients of CreativeOne Wealth are not obligated in any manner to utilize the aforementioned services provided by Ms. Landry.

CreativeOne Wealth does not supervise and does not receive any compensation from these Other Outside Business Activities.

### **Item 5: Additional Compensation**

Kelly T. Landry may receive additional compensation in the form of sales awards and/or marketing credits depending on levels of overall sales in connection with services provided to the client. These incentives might constitute a conflict of interest as they could encourage Ms. Landry to recommend transactions for the purpose of attaining these awards. Clients are under no obligation to engage in any securities or advisory transactions.

### **Item 6: Supervision**

As an Investment Advisor Representative of CreativeOne Wealth LLC, Kelly T. Landry is supervised by J.P. Rankin, the firm's Chief Compliance Officer, and is to adhere to the policies and procedures set forth by CreativeOne Wealth LLC. The phone number for Mr. Rankin is (913) 402-2175.