



Registered Investment Advisor

Financial Security | Time Freedom | Generational Prosperity

Form ADV Part 2A – Firm Brochure

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Investment Advisor Representatives (IARs)

Mr. Eric S. Olsen

Mr. Jay B. Page

This brochure provides information about the qualifications and business practices of Olsen Family Financial, LLC. If you have any questions about the contents of this brochure, please contact us at (617) 315-8781. The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Olsen Family Financial, LLC is also available on the SEC's website at www.adviserinfo.sec.gov using for firm's identification number 282627.

Olsen Family Financial, LLC is registered (or exempt from registration) as an Investment Advisor in the states in which it has clients. Registration does not imply a certain level of skill or training.

Item 2: Summary of Material Changes

The last update of this brochure was filed on August 16th, 2020. The following changes have been made to this version of the Disclosure Brochure:

Item 4: The dollar amount of Assets Under Management was added to this section.

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Item 4: Advisory Business

Olsen Family Financial, LLC (OlsenFF) is a Registered Investment Advisory (RIA) firm established in March of 2016 and owned by Mr. Eric S. Olsen, Principal. Mr. Olsen and Mr. Jay B. Page operate under the firm as Investment Advisor Representatives (IARs). OlsenFF is founded on the premise that a better service can be provided for a lower cost if the focus remains on what's important and not on what's popular or conventional. We motivate our clients through education and strive to help them understand every recommendation we propose. We base our recommendations on low cost, index fund or Exchange Traded Fund (ETF) investing with an emphasis on strategic asset allocation. We make ourselves available to the client in person, through video conferencing, and over the phone to answer questions, remove doubts and celebrate successes together. We treat the client/advisor relationship as a partnership. We are family focused and understand that our company exists to serve families through the peace afforded by financial security and prosperity.

We offer a comprehensive service that incorporates the three interrelated roles of a Financial Planner, Investment Advisor, and Financial Coach. Our work as Financial Planners helps our clients identify and succeed in the key basic tenets of finance such as budgeting, investing towards specific goals, personal financial statements, insurance/risk management, retirement planning, college savings, work/government benefits (including military benefits), rudimentary estate planning, etc. The culmination of this work, generated through the initial client meetings, is the Comprehensive Financial Plan, received at the end of the initial three meetings as an electronic report and executive summary that outlines the client's goals, current situation, and recommendations.

As Investment Advisors, we will provide specific investment plans and advice according to the goals and risk tolerance we discuss with our clients. We provide plans outlining recommended asset allocation and assist our clients in rebalancing towards target allocations as life circumstances and timelines progress. In addition, we manage taxable brokerage, IRA and other accounts through a third-party custodian on a discretionary basis (this means your assets will remain under your control at the custodian we utilize while we will have the ability to monitor the portfolio at all times and to make trades on your behalf. See Item 16 for more information) through our Investment Management Service (IMS).

As Financial Coaches, we provide possibly the most important service to our clients: helping them understand and combat some of the greatest pitfalls of behavioral finance and acting as an accountability partner. In this role, we help them prioritize goals and see the way in which our natural human tendencies are often exactly what prevents us from realizing those goals. In addition, we provide a personal level of accountability and support as clients learn to develop or strengthen the financial discipline necessary for continued success.

The Comprehensive Financial Plan and Financial Checkup/Portfolio Rebalance (FC/PR) consist of two parts: an advisor prepared Executive Summary document, and a generated report. The initial Comprehensive Plan takes place over three 1-2 hours long in-person or virtual meetings and culminates in a plan that addresses client goals, current financial

position, debt repayment strategies, cash flow management, current vs. target asset allocation investment recommendations, retirement analysis, insurance evaluation, college planning, and actionable tasks. After the plan is delivered, clients may become ongoing clients through an annual fee, billed monthly in arrears beginning on the first of the month after the initial Comprehensive Financial Plan is delivered.

The Ongoing Financial Planning includes the FC/PR meeting(s), optional Phone Consultations, optional Phone Check-Ins, and Newsletters. The FC/PR is an opportunity to assess implementation, update to the client's plan to incorporate changes in goals or financial situation, recommend portfolio rebalance changes, and to continue to optimize the client's financial situation. It takes place over one or two 1-2 hour in person or virtual meetings. For Ongoing Financial Planning clients, IARs will make two attempts to remind the Client to schedule their meeting (one reminder in the monthly newsletter and one generated by RightCapital). If a meeting is not scheduled in its given month then it may be carried into the subsequent month(s) at the client's request. The optional Phone Consultation is a 1-2 hour phone call (virtual meeting by request) to address specific client questions, discuss advisor identified topics, review progress on previously established goals and tasks, and review the latest financial plan as necessary. The optional Phone Check-In is a 15-30 minute call to review progress on previously established goals and tasks or briefly discuss big picture client questions. The newsletters are generic educational material unspecific to each client, written by OlsenFF, with the intent to not only inform but also motivate the client in a short, concise format. These newsletters cannot be purchased as a stand-alone service. The Hourly Consultation gives an ongoing client the opportunity to reach out between meetings with the same intent as the Phone Consultation or for parties to work with OlsenFF as a stand-alone service. There are two different service level choices for ongoing clients and the details outlining the difference between these two plans is outlined on the following page:

Platinum Plan - Schedule of Services

- 1st Month - Comprehensive Financial Plan (first year)
or Financial Checkup/Portfolio Rebalance (subsequent years)
- 2nd Month - Newsletter
- 3rd Month - Newsletter
- 4th Month - Optional Phone Consultation (1-2 hours)
- 5th Month - Newsletter
- 6th Month - Newsletter
- 7th Month - Financial Checkup/Portfolio Rebalance
- 8th Month - Newsletter
- 9th Month - Newsletter
- 10th Month - Optional Phone Consultation (1-2 hours)
- 11th Month - Newsletter
- 12th Month - Newsletter

Silver Plan - Schedule of Services

- 1st Month - Comprehensive Financial Plan (first year)
or Financial Checkup/Portfolio Rebalance (subsequent years)
- 2nd Month - Newsletter
- 3rd Month - Newsletter
- 4th Month - Optional Phone Check-In (15-30 min)
- 5th Month - Newsletter
- 6th Month - Newsletter
- 7th Month - Optional Phone Consultation (1-2 hours)
- 8th Month - Newsletter
- 9th Month - Newsletter
- 10th Month - Optional Phone Check-In (15-30 min)
- 11th Month - Newsletter
- 12th Month - Newsletter

OlsenFF will also work with the clients in advising assets held in company retirement accounts such as 401(k)s, 403(b)s, Thrift Savings Plan accounts, etc. Each financial plan will be specifically tailored to the client utilizing ETFs or index funds (when possible) based on the client's goals, time horizon, risk tolerance/capacity, and financial situation. Clients may impose restrictions on investment products. If the client currently holds individual stocks or other financial products that they do not wish to liquidate, the advisor can build those holdings into their current portfolio. OlsenFF does not take physical custody of client's funds; instead, we manage funds on a discretionary basis through the third-party custodian. The IMS will only be provided for Ongoing Financial Planning clients (it cannot be purchased as a separate service). OlsenFF manages roughly \$700,000 of client assets on a discretionary basis and \$0 on a non-discretionary basis as of Aug. 16th, 2020.

For those clients who are rental real estate investors, or are considering becoming landlords, we will provide a review of the risks involved in rental real estate investing in the context of your total financial picture, as well as make recommendations for an asset

allocation strategy which accounts for your real estate investments. Our services include incorporating your existing or potential rental properties into your overall cash flow and budget, risk management, retirement and estate plan recommendations, which may include making projections and modeling different scenarios. We may also offer general guidelines and best practices for rental property financial management, including cash reserves, insurance planning and property management. Note: OlsenFF does not execute real estate property assessments, appraisals, nor any other evaluation as to the current ownership status, lending, liens, or the condition of any real estate property. OlsenFF does not purchase, sell, or facilitate the purchase or sale of real estate property and is not responsible for the performance of real estate investments relative to discussed projections and strategies.

We may provide seminars or other public speaking engagements on an “as announced” basis for groups seeking general education on investments and other areas of personal finance. The content of these seminars will vary depending upon the needs of the attendees. These seminars are purely educational in nature and do not involve the sale of any investment products. Information presented will not be based on any individual’s person’s need, nor does OlsenFF provide individualized investment advice to attendees during these seminars.

Item 5: Fees and Compensation

It is important to OlsenFF that we offer a simple and straightforward fee structure without binding clients to long term contracts. We strive to competitively price our offering with relation to the general marketplace for financial services, and we encourage all clients to shop the market and compare our fees and services to other financial advisory firms. The fee schedule is outlined below:

- ❑ Comprehensive Financial Plan - \$2,500
- ❑ Ongoing Financial Planning, Platinum Plan - \$3000/year (billed monthly in arrears)
- ❑ Ongoing Financial Planning, Silver Plan - \$2,100/year (billed monthly in arrears)
- ❑ Investment Management Service – 0.40% of Assets Under Management
- ❑ Hourly Consultation - \$200 per hour

As part of our IMS, OlsenFF manages client assets (Assets Under Management or AUM) at a third-party custodian on a discretionary basis for 0.40% of the managed account values as calculated on the last day of the quarter. Once the managed assets reach a total of \$1,000,000, the Ongoing Financial Planning fee will be waived and the service level upgraded to the Platinum Plan (if not already). If managed assets drop below \$900,000 due to client withdrawals (and not market losses), clients will be reverted back to their old plan until managed assets once again reach \$1,000,000 and if this happens, clients will receive written notification of this reversion.

Fees for the Comprehensive Financial Plan, Ongoing Financial Planning, and hourly consultations are billed to clients, not directly deducted from client assets, and may be paid by electronic funds transfer or check. Fees for the IMS are, pro-rated and paid in arrears on

a quarterly basis. The advisory fee is an Assets Under Management (AUM) fee that is calculated by multiplying the above rate of 0.40% by the client's total assets as calculated on the last day of the previous quarter and divided by four. For example, if a client had \$100,000 of managed assets on March 31st, their fee for that quarter would be $(\$100,000 * 0.40\%) / 4 = \100 . Investment Management fees are deducted from the client account at the third-party custodian. For more information regarding the deduction of our management fees from the client's account, please see Item 15 below.

Our fees are exclusive of brokerage commissions, transaction fees, and other related costs and expenses which may be incurred by the client. Clients may incur certain charges imposed by custodians, brokers, and other third parties such as custodial fees, deferred sales charges, odd-lot differentials, transfer taxes, wire transfer and electronic fund fees, and other fees and taxes on brokerage accounts and securities transactions. Mutual fund and ETFs charge internal management fees, which are disclosed in a fund's prospectus. Such charges, fees and commissions are exclusive of and in addition to our fee, and we shall not receive any portion of these commissions, fees, and cost; however, investment advice is provided with the goal of minimizing these fees and helping clients to invest as cost effectively as possible. OlsenFF is a "Fee-Only" financial advisor, which means we will never receive commissions on products recommended to clients. More information may be found under Item 12. Fees may be negotiated on a client by client basis and OlsenFF will never disclose to a third party how a client is billed for services. No increase in the annual fee shall be effective without agreement from the client by signing a new agreement or by agreement from the client in writing. The ongoing relationship may be terminated by the client at any time via written notification and the client will only be billed for the final month's fees (or quarter in the case of managed assets) on a pro-rata basis from the day the termination notice. For example, if a client provided notice of termination on the 15th day of the month, they would only be billed for days 1-15 of that month as their final bill. Since fees are paid in arrears, no refund of unearned fees will be needed upon termination. For all services provided, if the client elects for early termination, any fees for the hours already worked will be due at the Hourly Consultation rate. Finally, for the Comprehensive Financial Plan, 25% of the fee will be due within 10 calendar days of signing the Advisory Services Agreement with the remainder due within 15 calendar days of the final plan delivery. Please do not hesitate to ask on any information contained pertaining to fees and compensation.

Item 6: Performance-Based Fees and Side-By-Side Management

OlsenFF does not charge performance-based fees and therefore does not engage in side-by-side management.

Item 7: Types of Clients

OlsenFF specializes in working with family finances, small business owners, real estate investors, military service members, those seeking early financial independence, and medical professionals. We do not impose minimum Assets Under Management requirements.

Item 8: Methods of Analysis, Investment Strategies and Risk of Loss

OlsenFF provides analysis based on each client's individual goals, time horizon, risk tolerance/capacity, and financial situation. When ETFs or mutual funds are utilized and recommended to a client, they are evaluated on the basis of providing the most value to the client by attempting to select among the lowest cost options. This is predominantly analyzed by examining the funds expense ratio; portfolios are then built off the client's determined asset allocation. Tax implications are also considered when recommending investments and priority may be given to investments that will reduce a client's overall tax burden, even if fees may be higher. The selection of mutual funds and ETFs has more to do with the client's risk tolerance and situation than it does with the securities themselves, as asset allocation is of the utmost importance. It is crucial for the client to recognize that investing in securities involves the risk of loss of invested capital and clients must be prepared to bear that risk. Mutual funds and ETFs that mirror major market indices (including large company, small company, international equity, domestic bonds, etc.) are typically recommended and therefore, the client bears risk similar to the risk of that segment of the market. This includes significant loss of principal for a sustained duration and no guarantee that the asset will ever recover to its original value. For this reason, risk tolerance and the client's individual needs will be discussed extensively when recommendations are provided, to the end the client is empowered to make educated and informed decisions. In addition, as part of the initial Comprehensive Plan, we develop an Investment Policy Statement that is then reviewed and updated at subsequent Financial Checkup / Portfolio Rebalance meetings.

Item 9: Disciplinary Information

There is no disciplinary information to report for the firm or its IAR.

Item 10: Other Financial Industry Activities and Affiliations

No other financial industry activities or affiliations.

Item 11: Code of Ethics, Participation or Interest in Client

Transactions and Personal Trading

Mr. Olsen and Mr. Page operate under OlsenFF as IARs and use the same strategies investing in his own portfolio as with his clients. Because this includes ETFs (which trade like a stock, may be purchased above or below the Net Asset Value (NAV) of the ETF's holdings, and move in price according to the volume traded), this creates a conflict of interest in which Mr. Olsen and Mr. Page may buy the same securities they recommend to clients. This conflict is mitigated by following the strict Code of Ethics manual of OlsenFF which states that it is the duty of the IARs at all times to scrupulously avoid serving their own personal interest ahead of the interests of the client, that they must work diligently to ensure that no client is preferred over any other client, and that personal transactions in securities must be accomplished so as to avoid even the appearance of a conflict of interest on the part of the IARs with the interest of the clients. In addition, the IARs must avoid actions or activities that allow (or appear to allow) a person to profit or benefit from his or

her position with OlsenFF at the expense of clients, or that otherwise bring into question the person's independence or judgment and is naturally prohibited from engaging in any practice that defrauds or misleads any client, or engaging in any manipulative or deceitful practice with respect to clients or securities.

Item 12: Brokerage Practices

Under the IMS, OlsenFF participates in the TD Ameritrade Institutional program. TD Ameritrade Institutional is a division of TD Ameritrade, Inc. ("TD Ameritrade"), member FINRA/SIPC. TD Ameritrade is an independent SEC-registered broker-dealer. OlsenFF may recommend TD Ameritrade to clients for custody services. There is no direct link between OlsenFF's participation in the program and the investment advice it gives to its clients, although OlsenFF receives economic benefits (often referred to as "soft dollar benefits") through its participation in the program that are typically not available to TD Ameritrade retail investors. These benefits include the following products and services (provided without cost or at a discount): receipt of duplicate client statements and confirmations; research related products and tools; consulting services; access to a trading desk serving OlsenFF participants; access to block trading (which provides the ability to aggregate securities transactions for execution and then allocate the appropriate shares to client accounts); the ability to have advisory fees deducted directly from client accounts; access to an electronic communications network for client order entry and account information; access to mutual funds with no transaction fees and to certain institutional money managers; and discounts on compliance, marketing, research, technology, and practice management products or services provided to OlsenFF by third party vendors. TD Ameritrade may also have paid for business consulting and professional services received by OlsenFF's related persons. Some of the products and services made available by TD Ameritrade through the program may benefit OlsenFF but may not benefit its client accounts. These products or services may assist OlsenFF in managing and administering client accounts, including accounts not maintained at TD Ameritrade. Other services made available by TD Ameritrade are intended to help OlsenFF manage and further develop its business enterprise. The benefits received by OlsenFF or its personnel through participation in the program do not depend on the amount of brokerage transactions directed to TD Ameritrade.

As part of its fiduciary duties to clients, OlsenFF places the interests of its clients first. Clients should be aware, however, that the receipt of economic benefits by OlsenFF or its related persons in and of itself creates a conflict of interest and may indirectly influence OlsenFF's recommendation of TD Ameritrade for custody. We believe that our utilization of TD Ameritrade as the client's custodian is appropriate based on the fees charged for the services provided. We will combine multiple orders for shares of the same securities (a practice commonly referred to as "block trading").

Item 13: Review of Accounts

OlsenFF reviews client accounts during both the initial Comprehensive Financial Plan and FC/PR meetings. For Ongoing clients, accounts are reviewed either semi-annually or annually (depending on if the Platinum or Silver plan is selected) at the FC/PR meeting or when requested by the client due to significant life events through an Hourly Consultation service. Events that would constitute a significant life event include marriage, divorce, death or birth in the family, changes in employment, relocation, etc. and would be billed at the hourly rate presented in Item 5. These reviews take place by the firm's IARs, Mr. Olsen and Mr. Page. Personalized financial plans are provided to the client as a part of the initial meetings as well as after the FC/PR meeting. In addition to these reports, the custodian will provide client statements following their practices and procedures.

Client accounts under the Investment Management Service will be reviewed regularly and at the least on a quarterly basis by the IARs. The account is reviewed with regards to the client's investment policies and risk tolerance levels. Events that may trigger a special review would be unusual performance, addition or deletions of client-imposed restrictions, excessive draw-down, volatility in performance, or buy and sell decisions from the firm or per client's needs. Clients will receive trade confirmations from the broker(s) for each transaction in their accounts as well as monthly or quarterly statements and annual tax reporting statements from their custodian showing all activity in the accounts, such as receipt of dividends and interest. OlsenFF will not provide written reports to clients apart from what is received as part of the initial plan and after the FC/PR meeting.

Item 14: Client Referrals and Other Compensation

Although OlsenFF accepts and is continually grateful for referrals to other potential clients, in an effort to mitigate conflicts of interest, we do not provide referrals for compensation or provide compensation for referrals. OlsenFF receives no other compensation apart from the soft dollar benefits discussed in Item 12.

Item 15: Custody

OlsenFF does not accept custody of client funds except in the instance of withdrawing client fees for the IMS. For client accounts in which OlsenFF directly debits their advisory fee:

- I. OlsenFF will send a copy of its invoice to the custodian at the same time that it sends the client a copy.
- II. The custodian will send at least quarterly statements to the client showing all disbursements for the account, including the amount of the advisory fee.
- III. The client will provide written authorization to OlsenFF, permitting them to be paid directly for their accounts held by the custodian.

Clients should receive at least quarterly statements from the custodian that holds and maintains client's investment assets. We urge you to carefully review such statements and compare such official custodial statements to the reports that we may provide to you. Our

reports may vary from custodial statements based on accounting procedures, reporting dates, or valuation methodologies of certain securities.

Item 16: Investment Discretion

Under the IMS, we maintain discretion over client accounts with respect to securities to be bought and sold and the amount of securities to be bought and sold. Investment discretion is explained to clients in detail when an advisory relationship has commenced. At the start of the advisory relationship, the client will execute a Limited Power of Attorney, which will grant our firm discretion over the account. Additionally, the discretionary relationship will be outlined in the advisory contract and signed by the client.

Item 17: Voting Client Securities

OlsenFF does not vote Client proxies. Therefore, Clients maintain exclusive responsibility for: (1) voting proxies, and (2) acting on corporate actions pertaining to the Client's investment assets. The Client shall instruct the Client's qualified custodian to forward to the Client copies of all proxies and shareholder communications relating to the Client's investment assets. If the client would like our opinion on a particular proxy vote, they may contact us at the number listed on the cover of this brochure.

In most cases, you will receive proxy materials directly from the account custodian. However, in the event we were to receive any written or electronic proxy materials, we would forward them directly to you by mail, unless you have authorized our firm to contact you by electronic mail, in which case, we would forward you any electronic solicitation to vote proxies.

Item 18: Financial Information

We have no financial commitment that impairs our ability to meet contractual and fiduciary commitments to clients, and we have not been the subject of a bankruptcy proceeding. We do not have custody of client funds or securities (apart from constructive custody to bill under the IMS) or require or solicit prepayment of more than \$500 in fees per client six months in advance.

Item 19: Requirements for State-Registered Advisers

Mr. Eric S. Olsen, born June 26th, 1986, is the Owner and Principal of Olsen Family Financial, LLC. Mr. Olsen graduated in the top 10% of his class from the United States Air Force Academy with a Bachelor of Science in Management and a minor in Foreign Languages (Spanish) in 2010. In addition, he graduated with a Master of Liberal Arts, Finance degree from the Harvard Extension School in 2017 with the Dean's List Academic Achievement Award and graduated the Financial Planning Certificate Program from Boston University in 2018. Mr. Olsen passed the CFP® exam in Nov of 2019. In his military career, he has served as an Acquisitions Officer in the United States Air Force, taking on a program management role in stealth radar testing, flight testing, Information Technology network engineering, and cloud computing with a focus on cost, schedule, and performance since 2010. Mr. Olsen has earned his Program Management Level II certification from the Air Force, which

requires over 200 hours of formal education courses as well as a minimum of two years in program management with cost, schedule, and performance responsibilities. Mr. Olsen is currently an Instructor at the United States Air Force Academy teaching accounting and finance courses. He serves as an active duty officer in the United States Air Force, working normal business hours in that career and is an active real estate investor.

Mr. Jay B. Page, born October 26th, 1985, is an Investment Adviser Representative with Olsen Family Financial, LLC. Mr. Page graduated from the United States Air Force Academy with a Bachelor of Science in Foreign Area Studies and a minor in Foreign Languages (Spanish) in 2008. In addition, he graduated with a Master of Business Administration (MBA) degree from Oklahoma State University in 2014. In his Air Force career, Mr. Page served as a pilot in 3 different aircraft, including the B-1 Bomber, MQ-9 Reaper, and MQ-1 Predator (drone). His experience includes flying combat missions in the Middle East, flying strategic deterrence missions in the Pacific theater, acting as principal advisor and action officer for high-level executive leaders, and extensive experience leading and managing in small team office settings. He is currently a commercial airline pilot, as well as a Major in the Air Force Reserves as an Air Force Academy Admissions Liaison Officer.

At OlsenFF we are never compensated on performance-based fees and neither OlsenFF or it's IARs have ever been involved in an arbitration or civil self-regulatory or administrative proceeding. In addition, OlsenFF or it's IARs have no relationships with any issuer of securities as disclosed under Item 10.



Form ADV Part 2B - Brochure Supplement

The Investment Advisor Representative for Olsen Family Financial, LLC (OlsenFF) is:

Mr. Eric S. Olsen, CRD #6604883
Principal, Owner, Financial Planner, and Chief Compliance Officer

2372 Pelican Bay Dr.
Monument, CO 80132
Phone: (617) 315-8781
Email: Eric@OlsenFamilyFinancial.net
Website: <http://www.OlsenFamilyFinancial.com>

This brochure supplement provides information about Mr. Olsen that supplements the OlsenFF brochure. You should have received a copy of that brochure. Please contact our service center if you did not receive OlsenFF's brochure or if you have any questions about the contents of this supplement.

Additional information about Olsen Family Financial, LLC is also available on the SEC's website at www.adviserinfo.sec.gov using for firm's identification number 282627.

Item 2: Educational Background and Business Experience

Mr. Eric S. Olsen, born June 26th, 1986, is the Owner and Principal of Olsen Family Financial, LLC. Mr. Olsen graduated in the top 10% of his class from the United States Air Force Academy with a Bachelor of Science in Management and a minor in Foreign Languages (Spanish) in 2010. In addition, he graduated with a Master of Liberal Arts, Finance degree from the Harvard Extension School in 2017 with the Dean's List Academic Achievement Award and graduated the Financial Planning Certificate Program from Boston University in 2018. Mr. Olsen passed the CFP® exam in Nov of 2019. In his military career, he has served as an Acquisitions Officer in the United States Air Force, taking on a program management role in stealth radar testing, flight testing, Information Technology network engineering, and cloud computing with a focus on cost, schedule, and performance since 2010. Mr. Olsen has earned his Program Management Level II certification from the Air Force, which requires over 200 hours of formal education courses as well as a minimum of two years in program management with cost, schedule, and performance responsibilities. Mr. Olsen is currently an Instructor at the United States Air Force Academy teaching accounting and finance courses. He serves as an active duty officer in the United States Air Force, working normal business hours in that career and is an active real estate investor.

Item: 3 Disciplinary Information

There is no disciplinary information to report for Mr. Olsen.

Item 4: Other Business Activities

As stated above, Mr. Olsen is currently serving in Active Duty status as an officer in the United States Air Force. He works normal business hours for this job with additional training or mission related travel that is required on a semi-regular basis.

Item 5: Additional Compensation

We do not receive any compensation from any third party (other than the soft dollar benefits discussed in Part A, Item 12) for advisory services we provide to clients.

Item 6: Supervision

Mr. Olsen is self-supervised as he is the sole employee of OlsenFF and all decisions pertaining to the business and well as client recommendations are made exclusively by him. Mr. Olsen will adhere to the firm's Code of Ethics and Policies and Procedures.

Item 7: Requirements for State-Registered Advisers

Mr. Olsen does not have anything to disclose under this item.



Form ADV Part 2B - Brochure Supplement

The Investment Advisor Representative for Olsen Family Financial, LLC (OlsenFF) is:

Mr. Jay B. Page, CRD #7285795
Associate Advisor

2372 Pelican Bay Dr.
Monument, CO 80132
Phone: (617) 315-8781
Email: Jay@OlsenFamilyFinancial.net
Website: <http://www.OlsenFamilyFinancial.com>

This brochure supplement provides information about Mr. Page that supplements the OlsenFF brochure. You should have received a copy of that brochure. Please contact our service center if you did not receive OlsenFF's brochure or if you have any questions about the contents of this supplement.

Additional information about Olsen Family Financial, LLC is also available on the SEC's website at www.adviserinfo.sec.gov using for firm's identification number 282627.

Item 2: Educational Background and Business Experience

Mr. Jay B. Page, born October 26th, 1985, is an Investment Adviser Representative with Olsen Family Financial, LLC. Mr. Page graduated from the United States Air Force Academy with a Bachelor of Science in Foreign Area Studies and a minor in Foreign Languages (Spanish) in 2008. In addition, he graduated with a Master of Business Administration (MBA) degree from Oklahoma State University in 2014. In his Air Force career, Mr. Page served as a pilot in 3 different aircraft, including the B-1 Bomber, MQ-9 Reaper, and MQ-1 Predator (drone). His experience includes flying combat missions in the Middle East, flying strategic deterrence missions in the Pacific theater, acting as principal advisor and action officer for high-level executive leaders, and extensive experience leading and managing in small team office settings. He is currently a commercial airline pilot, as well as a Major in the Air Force Reserves as an Air Force Academy Admissions Liaison Officer.

Item: 3 Disciplinary Information

There is no disciplinary information to report for Mr. Page.

Item 4: Other Business Activities

Mr. Page is also a First Officer (pilot) for SkyWest Airlines. He works variable business hours depending on his flight schedule and his duties include ongoing training.

Item 5: Additional Compensation

We do not receive any compensation from any third party (other than the soft dollar benefits discussed in Part A, Item 12) for advisory services we provide to clients.

Item 6: Supervision

Mr. Page is supervised by the firm principal, Mr. Eric Olsen (who may be reached at 617-315-8781), in his financial planning/investment management duties. Mr. Olsen will review plans prepared and investments recommended by Mr. Page prior to them being presented to clients of the firm. Mr. Olsen will brief Mr. Page on his requirements to the firm's Code of Ethics and Policies and Procedures on an annual basis.

Item 7: Requirements for State-Registered Advisers

Mr. Page does not have anything to disclose under this item.