



**Item 1 – Cover Page**

**Required Disclosure:** This brochure supplement provides information about Kevin P. Ellis that supplements the brochure for Envision Financial LLC. You should have received a copy of that brochure. Please contact Envision Financial LLC if you did not receive the brochure for Envision Financial LLC or if you have any questions about the contents of this supplement.

Additional information about Kevin P. Ellis is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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## Form ADV Part 2 B

### Item 2 – Educational Background and Business Experience

Kevin P. Ellis, born in 1965, launched Envision Financial LLC in June 2021

*University of Wisconsin, Madison* – BBA, Finance & Investment Banking (1988)

*University of Wisconsin, Madison* – BBA, Accounting (1988)

*Vantage Financial LLC.* – Senior Wealth Advisor (November 2020 – May 2021)

Provided investment advisory, financial planning, tax, and trust administration services to retirees, affluent individuals, corporate executives and closely-held business owners

*Kyle Financial Services, Inc.* - President (February 2001 – November 2020)

Oversaw all aspects of SEC registered investment advisory and financial planning business; provided investment advisory, financial planning, tax, and trust administration services to retirees, affluent individuals, corporate executives and closely-held business owners

*Deloitte & Touche, LLP* - Senior Manager (October 1994 – January 2001)

Led the financial counseling practice of the Milwaukee office; provided investment advisory, financial planning and tax services to retirees, affluent individuals, corporate executives and closely-held business owners

*Price Waterhouse, LLP* – Manager (January 1989 – October 1994)

Provided tax and financial counseling services to affluent individuals, corporate executives and closely-held business owners

*Certified Financial Planning Practitioner (CFP® Practitioner)*

- Requires a bachelor's degree as well as an education requirement involving mastery of principles of financial planning, investment planning, income and estate tax planning, retirement planning, employee benefit planning and insurance and risk management (CPA license holders may waive the education requirements)
- Requires passing a 10-hour examination taken over two days (the passing rate for the exam was 57% when Kevin Ellis passed in 1997)
- Requires three years of work experience in financial planning
- Requires 30 hours of continuing education, including 2 hours of ethics, every two years

*Certified Public Accountant (CPA®)*

- Requires an undergraduate degree in accounting with a minimum of 150 credit hours
- Requires passing a 14-hour, four-part examination
- Requires passing an ethics examination
- Requires at least one year of experience in public accounting
- Requires 80 hours of continuing education, including 3 hours of ethics, every two years

*Series 63 License (1998); Series 65 License (1998)*

*Member AICPA, WICPA*

### Item 3 – Disciplinary Information

NONE – no history of discipline



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### **Item 4 – Other Business Activities**

**NONE – no other investment-related business activities**

### **Item 5 – Additional Compensation**

**NONE – no compensation from other sources (e.g. commissions from product sales)**

### **Item 6 – Supervision**

**Kevin Ellis is the President, Chief Compliance Officer, and sole owner of Envision Financial LLC as well as its sole investment advisor. As such, Kevin Ellis is self-supervised. Kevin Ellis can be reached at (262) 354-7155.**