

Cover Page



**KINGDOM LEGACY
ADVISORS**

AARON LINDBERG, CFP®, CFA®

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Minnetonka, Minnesota 55305**

Phone: (952) 697-2225

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**FORM ADV PART 2
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Aaron Lindberg that supplements the Kingdom Legacy Advisors brochure. You should have received a copy of that brochure. Please contact Aaron Lindberg if you did not receive a Kingdom Legacy Advisors' brochure or if you have questions about this supplement. Mr. Lindberg's CRD number is 2815255.

Additional information about Aaron Lindberg is also available on the SEC's website at www.adviserinfo.sec.gov.

Educational Background and Business Experience

Aaron Lindberg, CFP®, CFA®
Managing Principal / CCO
Year of Birth: 1974

Business Background:

Kingdom Legacy Advisors, Managing Principal / CCO, March 2025 - Present

GEN Financial Management, CIO / Partner, April 2018 – June 2025

Ameriprise Financial Services, Private Wealth Advisor, December 2009 – April 2018

Educational Background:

University of St. Thomas, Master of Business Administration, Graduated: 2001

University of Minnesota, Bachelor of Science in Finance, Graduated: 1998

RELEVANT DESIGNATIONS:

CERTIFIED FINANCIAL PLANNER™ (CFP®)

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 74,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- **Education** – Earn a bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board’s Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

CHARTERED FINANCIAL ANALYST® (CFA®)

A Chartered Financial Analyst (CFA) is a professional designation given by the CFA Institute, formerly AIMR, that measures the competence and integrity of financial analysts. Candidates are required to pass three levels of exams covering areas such as accounting, economics, ethics, money management and security analysis. Before you can become a CFA charter holder, you must have four years of investment/financial career experience and hold a bachelor's degree. Successful candidates take an average of four years to earn their CFA charter. The program covers a broad range of topics relating to investment management, financial analysis, stocks, bonds and derivatives, and provides a generalist knowledge of other areas of finance. The CFA charter is one of the most respected designations in finance, considered by many to be a gold standard in the field of investment analysis.

Form ADV, Part 2B, Item 3

Disciplinary Information

Mr. Lindberg does not have any reportable disciplinary disclosures.

Form ADV, Part 2B, Item 4

Other Business Activities

Aaron Lindberg has no other business activities.

Form ADV, Part 2B, Item 5

Additional Compensation

Aaron Lindberg does not receive any economic benefit from anyone, who is not a client, for providing advisory services.

Form ADV, Part 2B, Item 6

Supervision

Kingdom Legacy Advisors has written supervisory procedures in place that are reasonably designed to detect and prevent violations of the securities laws, rules, and regulations of the US Investment Advisers Act of 1940, as amended (the "Advisers Act"). Mr. Lindberg is Kingdom Legacy Advisors' Chief Compliance Officer, therefore he is responsible for all of the activities that occur on behalf of Kingdom Legacy Advisors and its clients. Mr. Lindberg can be reached at (952) 697-2225.

Form ADV, Part 2B, Item 7

Requirements for State-Registered Advisers

Aaron Lindberg does not have any reportable disciplinary events required to be disclosed in this section.