

Item 1 Cover Page

Agdeavor Investments, LLC

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March 22, 2021

FORM ADV PART 2A BROCHURE

This brochure provides information about the qualifications and business practices of Agdeavor Investments, LLC. If you have any questions about the contents of this brochure, please contact us at the phone number listed above. 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 Agdeavor Investments, LLC is also available on the SEC's website at www.adviserinfo.sec.gov. The searchable IARD/CRD number for Agdeavor Investments, LLC is 147340.

Agdeavor Investments, LLC is a registered investment adviser. Registration with the United States Securities and Exchange Commission or any state securities authority does not imply a certain level of skill or training.

Item 2 Summary of Material Changes

Form ADV Part 2 requires registered investment advisers to amend their brochure when information becomes materially inaccurate. If there are any material changes to an adviser's disclosure brochure, the adviser is required to notify you and provide you with a description of the material changes.

Since our last annual updating amendment dated November 14, 2019 we have made no material changes.

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Item 4 Advisory Business

Description of Services and Fees

Agdeavor Investments, LLC is a registered investment adviser based in Columbus, Ohio. We are organized as a limited liability company under the laws of the State of Delaware. We have been providing investment advisory services since 2008. We are owned by Bolt Financial Group, Inc. and Heartland Agdeavor, Inc. Currently, we offer the portfolio management services to clients and prospective clients.

We are indirectly owned by Shaun T. Carney.

The following paragraphs describe our services and fees. Please refer to the description of each investment advisory service listed below for information on how we tailor our advisory services to your individual needs. As used in this brochure, the words "we", "our" and "us" refer to Agdeavor Investments, LLC and the words "you", "your" and "client" refer to you as either a client or prospective client of our firm. Also, you may see the term Associated Person throughout this brochure. As used in this brochure, our Associated Persons are our firm's officers, employees, and all individuals providing investment advice on behalf of our firm.

Portfolio Management Services

We primarily offer discretionary portfolio management services and in limited circumstances, we offer non-discretionary portfolio management services. Our investment advice is tailored to meet our clients' needs and investment objectives. If you retain our firm for portfolio management services, we will meet with you to determine your investment objectives, risk tolerance, and other relevant information (the "suitability information") at the beginning of our advisory relationship. We will use the suitability information we gather to develop a strategy that enables our firm to give you continuous and focused investment advice and/or to make investments on your behalf. As part of our portfolio management services, we may customize an investment portfolio for you in accordance with your risk tolerance and investing objectives. Once we construct an investment portfolio for you, we will monitor your portfolio's performance on an ongoing basis, and will rebalance the portfolio as required by changes in market conditions and in your financial circumstances.

If you participate in our discretionary portfolio management services, we require you to grant our firm discretionary authority to manage your account. Discretionary authorization will allow our firm to determine the specific securities, and the amount of securities, to be purchased or sold for your account without your approval prior to each transaction. Discretionary authority is typically granted by the investment advisory agreement you sign with our firm, a power of attorney, or trading authorization forms. You may limit our discretionary authority (for example, limiting the types of securities that can be purchased for your account) by providing our firm with your restrictions and guidelines in writing. If you enter into non-discretionary arrangements with our firm, we must obtain your approval prior to executing any transactions on behalf of your account.

Types of Investments

We offer advice on equity securities, corporate debt securities, certificates of deposit, municipal securities, investment company securities, US Government securities, options contracts on securities and commodities, futures contracts, and interest in partnerships.

Additionally, we may advise you on any type of investment that we deem appropriate based on your stated goals and objectives. We may also provide advice on any type of investment held in your portfolio at the inception of our advisory relationship.

You may request that we refrain from investing in particular securities or certain types of securities. You must provide these restrictions to our firm in writing.

Assets Under Management

As of December 31, 2020, we provide continuous management services for \$24,640,851 in client assets on a discretionary basis.

Item 5 Fees and Compensation

Portfolio Management Services

Our fee for portfolio management services is based on a percentage of your assets we manage and is set forth in the following fee schedule:

| <u>Assets Under Management</u> | <u>Annual Fee</u> |
|--------------------------------|-------------------|
| Up to \$500,000 | 1.00% |
| Next \$250,000 | 0.90% |
| Over \$750,000 | 0.80% |

Our annual portfolio management fee is billed and payable monthly in arrears based on the average daily value of your account during the month, respectively.

If the portfolio management agreement is executed at any time other than the first day of a calendar quarter, our fees will apply on a pro rata basis, which means that the advisory fee is payable in proportion to the number of days in the quarter for which you are a client. Our advisory fee is negotiable, depending on individual client circumstances.

At our discretion, we may combine the account values of family members living in the same household to determine the applicable advisory fee. For example, we may combine account values for you and your minor children, joint accounts with your spouse, and other types of related accounts. Combining account values may increase the asset total, which may result in you paying a reduced advisory fee based on the available breakpoints in our fee schedule stated above.

We will deduct our fee directly from your account through the qualified custodian holding your funds and securities. We will deduct our advisory fee only when you have given our firm written authorization permitting the fees to be paid directly from your account. Further, the qualified custodian will deliver an account statement to you at least quarterly. These account statements will show all disbursements from your account. You should review all statements for accuracy.

You may terminate the portfolio management agreement upon 7-days' written notice to our firm. You will incur a pro rata charge for services rendered prior to the termination of the portfolio management agreement, which means you will incur advisory fees only in proportion to the number of days in the month for which you are a client.

We encourage you to review the statement(s) you receive from the qualified custodian. If you find any inaccurate information, please call our main office number located on the cover page of this brochure.

Additional Fees and Expenses

As part of our investment advisory services to you, we may invest, or recommend that you invest, in mutual funds and exchange traded funds. The fees that you pay to our firm for investment advisory services are separate and distinct from the fees and expenses charged by mutual funds or exchange traded funds (described in each fund's prospectus) to their shareholders. These fees will generally include a management fee and other fund expenses. You will also incur transaction charges and/or

brokerage fees when purchasing or selling securities. These charges and fees are typically imposed by the broker-dealer or custodian through whom your account transactions are executed. We do not share in any portion of the brokerage fees/transaction charges imposed by the broker-dealer or custodian. To fully understand the total cost you will incur, you should review all the fees charged by mutual funds, exchange traded funds, our firm, and others. For information on our brokerage practices, please refer to the "Brokerage Practices" section of this brochure.

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

We do not accept performance-based fees or participate in side-by-side management. Side-by-side management refers to the practice of managing accounts that are charged performance-based fees while at the same time managing accounts that are not charged performance-based fees.

Performance-based fees are fees that are based on a share of capital gains or capital appreciation of a client's account. Our fees are calculated as described in the *Portfolio Management Services* section above in Item 5, and are not charged on the basis of a share of capital gains upon, or capital appreciation of, the funds in your advisory account.

Item 7 Types of Clients

We offer investment advisory services to individuals, trusts, estates, charitable organizations, corporations, other business entities, and pooled investment vehicles.

In general, we do not require a minimum dollar amount to open and maintain an advisory account; however, we have the right to terminate your account if it falls below a minimum size which, in our sole opinion, is too small to manage effectively.

Additionally, we do charge a minimum fixed fee of \$450 for portfolio management services where the account value is less than \$45,000. This fee is billed and payable monthly in arrears. At our discretion we may waive the minimum fee.

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

Our Methods of Analysis and Investment Strategies

We may use one or more of the following methods of analysis or investment strategies when providing investment advice to you:

- Charting Analysis - involves the gathering and processing of price and volume information for a particular security. This price and volume information is analyzed using mathematical equations. The resulting data is then applied to graphing charts, which is used to predict future price movements based on price patterns and trends.
- Fundamental Analysis - involves analyzing individual companies and their industry groups, such as a company's financial statements, details regarding the company's product line, the experience and expertise of the company's management, and the outlook for the company's industry. The resulting data is used to measure the true value of the company's stock compared to the current market value.
- Technical Analysis - involves studying past price patterns and trends in the financial markets to predict the direction of both the overall market and specific stocks.
- Cyclical Analysis - a type of technical analysis that involves evaluating recurring price patterns and trends.
- Long Term Purchases - securities purchased with the expectation that the value of those securities will grow over a relatively long period of time, generally greater than one year.

- Short Term Purchases - securities purchased with the expectation that they will be sold within a relatively short period of time, generally less than one year, to take advantage of the securities' short-term price fluctuations.

Our investment strategies and advice may vary depending upon each client's specific financial situation. As such, we determine investments and allocations based upon your predefined objectives, risk tolerance, time horizon, financial horizon, financial information, liquidity needs, and other various suitability factors. Your restrictions and guidelines may affect the composition of your portfolio.

Charting and Technical Analysis - The risk of market timing based on technical analysis is that charts may not accurately predict future price movements. Current prices of securities may reflect all information known about the security and day to day changes in market prices of securities may follow random patterns and may not be predictable with any reliable degree of accuracy.

Fundamental Analysis - The risk of fundamental analysis is that information obtained may be incorrect and the analysis may not provide an accurate estimate of earnings, which may be the basis for a stock's value. If securities prices adjust rapidly to new information, utilizing fundamental analysis may not result in favorable performance.

Cyclical Analysis - Economic/business cycles may not be predictable and may have many fluctuations between long term expansions and contractions. The lengths of economic cycles may be difficult to predict with accuracy and therefore the risk of cyclical analysis is the difficulty in predicting economic trends and consequently the changing value of securities that would be affected by these changing trends.

Our strategies and investments may have unique and significant tax implications. However, unless we specifically agree otherwise, and in writing, tax efficiency is not our primary consideration in the management of your assets. Regardless of your account size or any other factors, we strongly recommend that you continuously consult with a tax professional prior to and throughout the investing of your assets.

Moreover, as a result of revised IRS regulations, custodians and broker-dealers will begin reporting the cost basis of equities acquired in client accounts on or after January 1, 2011. Your custodian will default to the FIFO (First-In First-Out) accounting method for calculating the cost basis of your investments. You are responsible for contacting your tax advisor to determine if this accounting method is the right choice for you. If your tax advisor believes another accounting method is more advantageous, please provide written notice to our firm immediately and we will alert your account custodian of your individually selected accounting method. Please note that decisions about cost basis accounting methods will need to be made before trades settle, as the cost basis method cannot be changed after settlement.

Risk of Loss

Investing in securities involves risk of loss that you should be prepared to bear. We do not represent or guarantee that our services or methods of analysis can or will predict future results, successfully identify market tops or bottoms, or insulate clients from losses due to market corrections or declines. We cannot offer any guarantees or promises that your financial goals and objectives will be met. Past performance is in no way an indication of future performance.

Recommendation of Particular Types of Securities

As disclosed under the "Advisory Business" section in this Brochure, we may recommend other types of investments as appropriate for you since each client has different needs and different tolerance for risk. Each type of security has its own unique set of risks associated with it and it would not be possible

to list here all of the specific risks of every type of investment. Even within the same type of investment, risks can vary widely. However, in very general terms, the higher the anticipated return of an investment, the higher the risk of loss associated with it.

Item 9 Disciplinary Information

Agdeavor Investments, LLC has been registered and providing investment advisory services since 2008. Neither our firm nor our Associated Persons has any reportable disciplinary information.

Item 10 Other Financial Industry Activities and Affiliations

Arrangements with Affiliated Investment Adviser

We are affiliated with Bolt Financial Group, Inc. through common control and ownership. We will recommend that you use the services of our affiliate if appropriate and suitable for your needs. Our advisory services are separate and distinct from the fees paid to our affiliate for their services.

Referral arrangements with an affiliated entity present a conflict of interest for us because we may have a direct or indirect financial incentive to recommend an affiliated firm's services. While we believe that compensation charged by an affiliated firm is competitive, such compensation may be higher than fees charged by other firms providing the same or similar services. You are under no obligation to use the services of any firm we recommend, whether affiliated or otherwise, and may obtain comparable services and/or lower fees through other firms.

Item 11 Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

Description of Our Code of Ethics

We strive to comply with applicable laws and regulations governing our practices. Therefore, our Code of Ethics includes guidelines for professional standards of conduct for our Associated Persons. Our goal is to protect your interests at all times and to demonstrate our commitment to our fiduciary duties of honesty, good faith, and fair dealing with you. All of our Associated Persons are expected to adhere strictly to these guidelines. Persons associated with our firm are also required to report any violations of our Code of Ethics. Additionally, we maintain and enforce written policies reasonably designed to prevent the misuse or dissemination of material, non-public information about you or your account holdings by persons associated with our firm.

Clients or prospective clients may obtain a copy of our Code of Ethics by contacting us at the telephone number on the cover page of this brochure.

Participation or Interest in Client Transactions

Neither our firm nor any of our Associated Persons has any material financial interest in client transactions beyond the provision of investment advisory services as disclosed in this brochure.

Personal Trading Practices

Our firm or persons associated with our firm may buy or sell the same securities that we recommend to you or securities in which you are already invested. A conflict of interest exists in such cases because we have the ability to trade ahead of you and potentially receive more favorable prices than you will receive. To eliminate this conflict of interest, it is our policy that neither our Associated Persons nor we shall have priority over your account in the purchase or sale of securities.

Item 12 Brokerage Practices

We recommend the brokerage services of Trade-PMR, Inc., a securities broker-dealer and a member of the Financial Industry Regulatory Authority and the Securities Investor Protection Corporation. Trade-PMR, Inc. has entered into an agreement with Wells Fargo Clearing Services, LLC to execute and clear securities transactions for all accounts. Wells Fargo Clearing Services will carry and maintain these accounts (as defined by SEC Securities Investors Protection Act) under the terms of the fully disclosed clearing agreement, except as may otherwise be provided in the Client Account Agreement signed between clients and Trade-PMR, Inc.

We believe that Trade-PMR provides quality execution services for you at competitive prices. Price is not the sole factor we consider in evaluating best execution. We also consider the quality of the brokerage services provided by Trade-PMR, including the value of research provided, the firm's reputation, execution capabilities, commission rates, and responsiveness to our clients and our firm. In recognition of the value of research services and additional brokerage products and services Trade-PMR provides, you may pay higher commissions and/or trading costs than those that may be available elsewhere.

The research products and services that Agdeavor may receive from brokerage firms (e.g. Trade-PMR, among others) may include financial publications, information about particular companies and industries, and other products or services that provide lawful and appropriate assistance to the Firm in the performance of its investment decision-making responsibilities. Such research products and services are provided to all investment advisers who may use that particular broker-dealer and are not considered to be paid for with soft dollars. However, the commissions charged by a particular broker for a particular transaction, or set of transactions, may be greater than the amounts another broker who did not provide research services or products might charge.

Brokerage for Client Referrals

We do not receive client referrals from broker-dealers in exchange for cash or other compensation, such as brokerage services or research.

Directed Brokerage

We routinely recommend that you direct our firm to execute transactions through Trade-PMR. As such, we may be unable to achieve the most favorable execution of your transactions and you may pay higher brokerage commissions than you might otherwise pay through another broker-dealer that offers the same types of services. Not all advisers require their clients to direct brokerage.

In limited circumstances, and at our discretion, some clients may instruct our firm to use one or more particular brokers for the transactions in their accounts. This practice may prevent our firm from obtaining favorable net price and execution. Thus, when directing brokerage business, you should consider whether the commission expenses, execution, clearance, and settlement capabilities that you will obtain through your broker are adequately favorable in comparison to those that we would otherwise obtain for you.

Block Trades

Transactions for each client generally will be effected independently, unless we decide to purchase or sell the same securities for several clients at approximately the same time. We may, but are not obligated to, combine multiple orders for shares of the same securities purchased for advisory accounts we manage (this practice is commonly referred to as "block trading"). We will then distribute a portion of the shares to participating accounts in a fair and equitable manner. The distribution of the shares purchased is typically proportionate to the size of the account, but it is not based on account performance or the amount or structure of management fees. Subject to our discretion regarding factual and market conditions, when we combine orders, each participating account pays an average price per share for all transactions and pays a proportionate share of all transaction costs on any given day. Accounts owned by our firm or persons associated with our firm may participate in block trading with your accounts; however, they will not be given preferential treatment.

Item 13 Review of Accounts

Shaun Carney, Chief Compliance Officer of our firm, will monitor your accounts on an ongoing basis and will conduct account reviews at least quarterly and upon your request to ensure that the advisory services provided to you are consistent with your stated investment needs and objectives. Additional reviews may be conducted based on various circumstances, including, but not limited to:

- contributions and withdrawals,
- year-end tax planning,
- market moving events,
- security specific events, and/or,
- changes in your risk/return objectives.

We will not provide you with additional or regular written reports in conjunction with account reviews. In addition, you will receive trade confirmations and monthly or quarterly statements from your account custodian(s).

Item 14 Client Referrals and Other Compensation

We do not receive any compensation from any third party in connection with providing investment advice to you nor do we compensate any individual or firm for client referrals.

Please refer to the *Brokerage Practices* section above for disclosures on research and other benefits we may receive resulting from our relationship with Trade-PMR.

Item 15 Custody

As paying agent for our firm, your independent custodian will directly debit your account(s) for the payment of our advisory fees. This ability to deduct our advisory fees from your accounts causes our firm to exercise limited custody over your funds or securities. We do not have physical custody of any of your funds and/or securities. Your funds and securities will be held with a bank, broker-dealer, or other independent qualified custodian. You will receive account statements from the independent qualified custodian(s) holding your funds and securities at least quarterly. The account statements from your custodian(s) will indicate the amount of our advisory fees deducted from your account(s) each billing period. You should carefully review account statements for accuracy.

You should review the statements from your account custodian(s). If you have a question regarding your account statement, or if you did not receive a statement from your custodian, please contact us directly at the telephone number on the cover page of this brochure.

Item 16 Investment Discretion

Before we can buy or sell securities on your behalf, you must first sign our discretionary management agreement and/or trading authorization forms.

You may grant our firm discretion over the selection and amount of securities to be purchased or sold for your account(s) without obtaining your consent or approval prior to each transaction. You may specify investment objectives, guidelines, and/or impose certain conditions or investment parameters for your account(s). For example, you may specify that the investment in any particular stock or industry should not exceed specified percentages of the value of the portfolio and/or restrictions or prohibitions of transactions in the securities of a specific industry or security. Please refer to the "Advisory Business" section in this brochure for more information on our discretionary management services.

If you enter into non-discretionary arrangements with our firm, we will obtain your approval prior to the execution of any transactions for your account(s). You have an unrestricted right to decline to implement any advise provided by our firm on a non-discretionary basis.

Item 17 Voting Client Securities

We will not vote proxies on behalf of your advisory accounts. At your request, we may offer you advice regarding corporate actions and the exercise of your proxy voting rights. If you own shares of applicable securities, you are responsible for exercising your right to vote as a shareholder. 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 any electronic solicitation to vote proxies.

Item 18 Financial Information

We are not required to provide financial information to our clients because we do not:

- require the prepayment of more than \$500 in fees and six or more months in advance, or
- take custody of client funds or securities, or
- have a financial condition that is reasonably likely to impair our ability to meet our commitments to you.

Item 19 Requirements for State Registered Advisers

Shaun Carney is the Managing Partner of our firm. Please refer to the Part(s) 2B for background information on Mr. Carney and those giving advice on behalf of our firm.

Neither our firm, nor any of our Associated Persons are compensated for advisory services with performance-based fees. Please refer to the "Performance-Based Fees and Side-By-Side Management" section above for additional information on this topic.

Neither our firm, nor any of our Associated Persons have any reportable arbitration claims, civil, self-regulatory organization proceeding or administrative proceeding.

Neither our firm, nor any of our Associated Persons have a material relationship or arrangement with any issuer of securities.

Item 20 Additional Information

Your Privacy

We view protecting your private information as a top priority. Pursuant to applicable privacy requirements, we have instituted policies and procedures to ensure that we keep your personal information private and secure.

We do not disclose any nonpublic personal information about you to any nonaffiliated third parties, except as permitted by law. In the course of servicing your account, we may share some information with our service providers, such as transfer agents, custodians, broker-dealers, accountants, consultants, and attorneys.

We restrict internal access to nonpublic personal information about you to employees, who need that information in order to provide products or services to you. We maintain physical and procedural safeguards that comply with regulatory standards to guard your nonpublic personal information and to ensure our integrity and confidentiality. We will not sell information about you or your accounts to anyone. We do not share your information unless it is required to process a transaction, at your request, or required by law.

You will receive a copy of our privacy notice prior to or at the time you sign an advisory agreement with our firm. Thereafter, we will deliver a copy of the current privacy policy notice to you on an annual basis. Please contact our main office at the telephone number on the cover page of this brochure if you have any questions regarding this policy.

Trade Errors

In the event a trading error occurs in your account, our policy is to restore your account to the position it should have been in had the trading error not occurred. Depending on the circumstances, corrective actions may include canceling the trade, adjusting an allocation, and/or reimbursing the account. If a trade error results in a profit, you will keep the profit.

Class Action Lawsuits

We do not determine if securities held by you are the subject of a class action lawsuit or whether you are eligible to participate in class action settlements or litigation nor do we initiate or participate in litigation to recover damages on your behalf for injuries as a result of actions, misconduct, or negligence by issuers of securities held by you.

2B: Larry Thompson

Larry Thompson

Agdeavor Investments, LLC

**5701 N High Street Suite 100
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March 22, 2021

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Larry Thompson that supplements the Agdeavor Investments, LLC brochure. You should have received a copy of that brochure. Please contact us at the phone number above if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Larry Thompson, is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD# 5539699.

Item 2 Educational Background and Business Experience

Larry E. Thompson

Year of Birth: 1949

Formal Education:

- Ohio University, B.A., Business Administration in Management, 1996

Business Background Previous Five Years:

- Agdeavor Investments, LLC, Wealth Advisor, Investment Adviser Representative, 11/2019 - Present
- Agdeavor Investments, LLC, Managing Member, Investment Adviser Representative/Chief Compliance Officer, 06/2007 -11/2019
- Heartland Agdeavor, Inc., CEO, 11/2001 - Present
- Thompson Business Associates, President, 03/2005 - Present
- Goodview LLC, Executive Director, 12/2005 - 03/2009
- United States Ag Producers Alliance, Chairman, 08/2003 - 12/2007

Item 3 Disciplinary Information

Mr. Thompson does not have, nor has he ever had, any disciplinary disclosure.

Item 4 Other Business Activities

Larry E. Thompson, Managing Member of Agdeavor Investments, LLC, is also the Chief Executive Officer of Heartland Agdeavor Inc. Mr. Thompson expects to spend up to 25% of his time with this non-advisory activity.

Item 5 Additional Compensation

Mr. Thompson does not receive any additional compensation for providing advisory services beyond that received as a result of his capacity as Managing Member of Agdeavor Investments, LLC.

Please refer to the *Other Business Activities* section above for disclosures on Mr. Thompson's receipt of additional compensation as a result of his activities as Chief Executive Officer of Heartland Agdeavor Inc.

Item 6 Supervision

Shaun Carney, Chief Compliance Officer of Agdeavor Investments, LLC, is responsible for supervising the advisory activities of the firm. Shaun Carney can be reached at (614) 516-0792.

Item 7 Requirements for State-Registered Advisers

Larry Thompson does not have, or has ever had, any reportable arbitration claims, has not been found liable in a reportable civil, self-regulatory organization or administrative proceeding, and has not been the subject of a bankruptcy petition.

2B: Shaun Carney

Shaun Carney
Agdeavor Investments, LLC
5701 N High Street Suite 100
Worthington, OH 43085

Phone: (614) 516-0792

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FORM ADV PART 2B
BROCHURE SUPPLEMENT

This brochure supplement provides information about Shaun Carney that supplements the Agdeavor Investments brochure. You should have received a copy of that brochure. Please contact us at the phone number above if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about Shaun Carney is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD#: 6827381.

Item 2 Educational Background and Business Experience

Shaun Carney

Year of Birth: 1985

Formal Education After High School:

- United States Air Force Academy, BS Systems Engineering Management, 5/2008
- Air Force Institute of Technology, MS Cost Analysis, 3/2013

Business Background:

- Agdeavor Investments, LLC d/b/a Agdeavor Investments, Chief Compliance Officer, 11/2019 - Present
- Agdeavor Investments, LLC d/b/a Agdeavor Investments, Investment Adviser Representative, 12/2018 - Present
- Bolt Financial Group, Inc, President, 11/2017 - Present
- United States Air Force Reserves, Pilot / Military Officer, 03/2015 to Present
- Edward Jones, Financial Advisor, 07/2017 to 11/2017
- United States Air Force, Financial Services / Military Officer, 05/2008 to 03/2015

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Shaun Carney has no required disclosures under this item.

Item 4 Other Business Activities

Shaun Carney is a Co-Founder of Bolt Financial Group, Inc., a registered investment adviser. When appropriate, Mr. Carney may recommend that you use the investment advisory services of Bolt Financial Group, Inc. If you utilize the advisory services of Mr. Carney through Bolt Financial Group, Inc., he may receive additional fees or other compensation in his capacity as an investment adviser representative. These fees would be in addition to any fees charged for the advisory services provided through Agdeavor Investments.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Carney's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Other Financial Industry Activities and Affiliations* section of Agdeavor Investments, LLC's firm brochure for additional disclosures on this topic.

Item 6 Supervision

As the Chief Compliance Officer of Agdeavor Investments, Shaun Carney supervises the advisory activities of our firm. Shaun Carney can be reached at 614-516-0792.

Item 7 Requirements for State Registered Advisers

Shaun Carney does not have any reportable arbitration claims, has not been found liable in a reportable civil, self-regulatory organization or administrative proceeding, and has not been the subject of a bankruptcy petition.

2B: David Marlin

**David Marlin
Agdeavor Investments, LLC**

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**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about David Marlin that supplements the Agdeavor Investments brochure. You should have received a copy of that brochure. Please contact us at the phone number above if you did not receive our firm's brochure or if you have any questions about the contents of this supplement.

Additional information about David Marlin is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD#: 6925672.

Item 2 Educational Background and Business Experience

David Marlin

Year of Birth: 1962

Formal Education After High School:

- Embry-Riddle Aeronautical University, MS Aeronautical Science, 1997
- The University of Akron, BS Civil Engineering, 1985

Business Background:

- Agdeavor Investments, LLC d/b/a Agdeavor Investment, Investment Adviser Representative, 12/2018 - Present
- Bolt Financial Group, Inc., Wealth Advisor, 2/2018 - Present
- FlightSafety Services Corp., Pilot Instructor, 11/2018 - Present
- L3 Technologies, Pilot Instructor, 5/2013 - 11/2018
- US Air Force, Officer/Pilot, 4/1986 - 5/2013

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. David Marlin has no required disclosures under this item.

Item 4 Other Business Activities

David Marlin is an Investment Adviser Representative of Bolt Financial Group, Inc., a registered investment adviser. When appropriate, Mr. Marlin may recommend that you use the investment advisory services of Bolt Financial Group, Inc. If you utilize the advisory services of Mr. Marlin through Bolt Financial Group, Inc., he may receive additional fees or other compensation in his capacity as an investment adviser representative. These fees would be in addition to any fees charged for the advisory services provided through Agdeavor Investments.

Additionally, David Marlin spends about 75% of his time working as a Pilot Instructor at FlightSafety Services Corp.

Item 5 Additional Compensation

Please refer to the *Other Business Activities* section above for disclosures on Mr. Marlin's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Other Financial Industry Activities and Affiliations* section of Agdeavor Investments, LLC's firm brochure for additional disclosures on this topic.

Item 6 Supervision

Shaun Carney, Chief Compliance Officer of Agdeavor Investments, LLC, is responsible for supervising the advisory activities of the firm. Shaun Carney can be reached at (614) 516-0792.

Item 7 Requirements for State Registered Advisers

David Marlin does not have any reportable arbitration claims, has not been found liable in a reportable civil, self-regulatory organization or administrative proceeding, and has not been the subject of a bankruptcy petition.