

Item 1 - Cover Page

**SCHNELL FINANCIAL GROUP, LLC
821 THOMPSON BLVD.
SEDALIA, MISSOURI 65301
(660) 826-4778
CRD NUMBER: 137969**

**BROCHURE
Part 2A of Form ADV
April 7, 2026**

Contact: Kevin L. Schnell, Compliance Administrator
821 Thompson Blvd.
Sedalia, Missouri 65301
www.schnellfinancialgroup.com

This brochure provides information about the qualifications and business practices of Schnell Financial Group, LLC. If you have any questions about the contents of this information, contact our Compliance Administrator at (660) 826-4778, or at legal@schnellfinancialgroup.com. 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 Schnell Financial Group, LLC is also available at the SEC's website at www.adviserinfo.sec.gov.

Registration as an investment advisor does not imply a certain level of skill or training

Item 2 - Material Changes

In 2010, the United States Securities and Exchange Commission amended the rules governing the disclosure brochure that registered investment advisors are required to provide to clients. This Brochure is prepared according to the regulatory requirements.

In the future, this Item 2 generally will discuss specific material changes that have been made since the last the Brochure provided to you. In the past, we have offered or delivered information about our qualifications and business practices to clients on at least an annual basis. Pursuant to the new rules, in the future, you will receive a summary of any materials changes to this and subsequent Brochures within 120 days of the close of our business fiscal year, which is the calendar year. We may also periodically provide information about material changes and/or a new Brochure at other times in a year, as necessary and without charge.

Schnell Financial Group, LLC filed it's annual amendment on April 7, 2026. Added additional investment advisor representative.

Item 3 - Table of Contents

Brochure Part 2A of Form ADV	Page Number
Item 1 - Cover Page	1
Item 2 - Material Changes	2
Item 3 - Table of Contents	3
Item 4- Advisory Business	5
Item 5 - Fees and Compensation	6
Item 6 - Performance-Based Fees and Side-by-Side Management	12
Item 7 - Types of Clients	12
Item 8 - Methods of Analysis, Investment Strategies and Loss	12
Item 9 - Disciplinary Information	14
Item 10 - Other Financial Industry Activities and Affiliations	14
Item 11 - Code of Ethics, Participation in Client Transactions and Personal Trading	14
Item 12 - Brokerage Practices	15
Item 13 - Review of Accounts	18
Item 14 - Client Referrals and Other Compensation	18
Item 15 - Custody	18
Item 16 - Investment Discretion	18
Item 17 - Voting Client Securities	18
Item 18 - Financial Information	19
Item 19 - Requirements for State Registered Advisors	19

Brochure Supplement Part 2B of Form ADV	Page Number
Supervised Person: Kevin L. Schnell, JD, CPA, CFP®	
Item 1 - Cover Page	20
Item 2 - Educational Background and Business Experience	21
Item 3 - Disciplinary Information	24
Item 4 - Other Business Activities	24
Item 5 - Additional Compensation	24

Brochure Supplement Part 2B of Form ADV	Page Number
Supervised Person: Wanda S. Schnell	
Item 1 - Cover Page	25
Item 2 - Educational Background and Business Experience	26
Item 3 - Disciplinary Information	26
Item 4 - Other Business Activities	27
Item 5 - Additional Compensation	27

Brochure Supplement Part 2B of Form ADV
Supervised Person: Keaton G. Schnell

Page Number

Item 1 - Cover Page	28
Item 2 - Educational Background and Business Experience	29
Item 3 - Disciplinary Information	29
Item 4 - Other Business Activities	29
Item 5 - Additional Compensation	29

Brochure Supplement Part 2B of Form ADV
Supervised Person: Kloe' D. Schnell

Page Number

Item 1 - Cover Page	30
Item 2 - Educational Background and Business Experience	31
Item 3 - Disciplinary Information	31
Item 4 - Other Business Activities	31
Item 5 - Additional Compensation	31

Item 4 - Advisory Business

Overview

Schnell Financial Group, LLC is a Legacy and Wealth Management firm. The mission of Schnell Financial Group, LLC is to assist individuals, families and business owners in planning, managing and maximizing their financial life to assure that our clients are protected and prepared for what the future holds, which is accomplished through exceptional financial advice which includes investment management, advanced tax planning and estate planning. Our services go beyond portfolio investment returns. You have worked hard for you money, we will work hard to protect your assets. One of the biggest factors that can drastically affect client's financial well-being are the tax consequences on investment returns as well as other tax related issues. Due to recent changes to our tax code, tax planning is essential to maximize your financial situation, especially if you are a successful business owner. Schnell Financial Group, LLC believes that exceptional financial advice identifies specific goals and objectives, and that the process requires a complete review of a client's assets, potential income, applicable tax rates (including estate taxes), applicable retirement benefit programs, insurance contracts, trust, wills, family limited partnerships, and other estate planning documents. For successful business owners, Schnell Financial Group, LLC provides investment advice and management of business retirement benefit plans, business and personal income tax planning, succession planning and how to obtain maximum value when selling the business.

Schnell Financial Group, LLC is registered as an investment adviser with the State of Missouri and the State of Kansas. Our company is organized as a Missouri limited liability company. Schnell Financial Group, LLC has been serving clients and their financial needs since 1989 starting as a tax preparation firm, adding investment management services in 2005. Schnell Financial Group, LLC is also registered as a Certified Public Accounting firm in the State of Missouri. Schnell Financial Group, LLC is owned by Kevin L. Schnell, JD, CPA, CFP® and Wanda S. Schnell.

Services Provided

Our Legacy and Wealth Management services we provide to individuals and families include financial planning, investment management, retirement planning, income tax planning and estate planning.

Schnell Financial Group, LLC also provides financial and investment advice to business clients, including retirement planning, risk management, business strategies, business succession planning, income tax planning and employee compensation planning.

Estate planning and advice regarding limited liability companies, family limited partnerships and related legal matters is provided by Kevin L. Schnell -Attorney at Law, LLC, operated by Kevin L. Schnell, member of Schnell Financial Group, LLC and associate Kloe' D. Schnell.

Schnell Financial Group, LLC provides ongoing investment management services on a discretionary basis. For discretionary accounts, Schnell Financial Group, LLC has the authority to make and execute day to day investment transactions in client portfolios without obtaining client approval. Clients grant such discretionary authority to Schnell Financial Group, LLC upon becoming clients of the firm. Clients may impose restrictions on investing in certain securities or types of securities.

As of January 1, 2026, Schnell Financial Group, LLC manages assets on a discretionary basis of \$67,285,485.28.

Advisors:

Advisor, Kevin L. Schnell is an Attorney licensed in Missouri and Kansas; a Certified Public Accountant; and a Certified Financial Planner practitioner. See Part 2B of Form ADV for additional information.

Advisor, Keaton G. Schnell, has been an advisor with Schnell Financial Group, LLC since July, 2021. See Part 2B of Form ADV for additional information.

Advisor, Kloe' D. Schnell has been an advisor with Schnell Financial Group, LLC since December, 2025. See Part 2B of Form ADV for additional information.

Office Locations-Schnell Financial Group, LLC has the following office locations:

2300 Main Street, Suite 900
Kansas City, Missouri 64108
(816) 421-6430

821 Thompson Boulevard
Sedalia, Missouri 65301
(660) 826-4778

200 NE Missouri Road, Suite 200
Lee's Summit, Missouri 64086
(816) 421-6430

Toll Free Number for all locations: (800) 725-7227

Item 5 - Fees and Compensation

Method of Compensation

Schnell Financial Group, LLC is a 100% fee only firm and does not receive commissions on any product recommended. The annual Legacy and Wealth Management fees are based on your asset values which is your net worth, less your non-business non-investment property (personal residence, secondary residence, household contents, guns, jewelry, antiques, vehicles, etc.). The asset values include (but are not limited to): Stocks, Bonds, ETF's, Mutual Funds, IRA's, other

Retirement Accounts (including Employer Sponsored Plans), Annuities, Life Insurance Cash Value, Certificates of Deposit, Savings Accounts, Checking Accounts, value of active Business Operations, Investment Real Estate (Commercial, Residential and Farm, including, but not limited to, those properties held in Limited Liability Companies, Limited Partnerships, and Corporations). The value of farm real estate, whether held personally, or in a business entity such as a Limited Liability Company, Limited Partnership or Corporation, will be valued at the average price per acre of the combined crop land, pasture land, timberland and hunting/recreation land values for the Missouri region the land is located in Missouri as published by the University of Missouri Extension-Missouri Farmland Values Opinion Survey (latest version dated October, 2024) for each calendar year. A similar method will be used for other states. If a similar publication is not available in the state, then the Missouri state average of the combined values will be used for the fee calculation. Farm Structures will be valued at historical cost. Farm machinery and equipment will be valued at Fifty Percent (50%) of historical cost. Livestock and crops (growing or in storage) are not used in the calculation of the Legacy and Wealth Management fee. Residential Rental Real Estate is valued at historical cost and depreciable tangible personal property is valued at Fifty Percent (50%) of historical cost. The value of active non-farm business operations is determined by the year end balance sheet total assets for the business operations, with the value of the real estate adjusted to historical cost and tangible depreciable personal property valued as Fifty Percent (50%) of historical cost.

This method of compensation allows Schnell Financial Group, LLC to be totally impartial in the investment recommendations and the planning services provided. Schnell Financial Group, LLC does not receive referral fees or commissions from any other advisor or pay referral fees to any other advisor. Schnell Financial Group, LLC is totally independent from outside influences that would affect the recommendations and planning provided. For individual clients, the fees below cover all financial management services provided, including investment management, tax planning, personal return income tax preparation and estate planning. Estate planning services are provided by Kevin L. Schnell - Attorney at Law, LLC and include the preparation, or amendment, of documents such as trusts, wills, financial power of attorneys, health care power of attorneys and other related estate planning documents. Services provided to business entities related to business strategies, succession planning, business tax planning and tax preparation services would result in additional fees to be determined based on the services provided. The fees below are not negotiable below the amounts stated. The fees may be increased depending on the complexity of a client's situation.

Fees for individuals and families are as follows:

Asset Value	Annual Fee
\$ 1,000,000.00 or less	\$ 5,000.00
\$ 1,000,001.00 to \$ 1,500,000.00	\$ 6,250.00
\$ 1,500,001.00 to \$ 2,000,000.00	\$ 7,500.00
\$ 2,000,001.00 to \$ 2,500,000.00	\$ 8,750.00
\$ 2,500,001.00 to \$ 3,000,000.00	\$ 10,000.00
\$ 3,000,001.00 to \$ 3,500,000.00	\$ 11,250.00
\$ 3,500,001.00 to \$ 4,000,000.00	\$ 12,500.00
\$ 4,000,001.00 to \$ 4,500,000.00	\$ 13,750.00
\$ 4,500,001.00 to \$ 5,000,000.00	\$ 15,000.00
\$ 5,000,001.00 to \$ 5,500,000.00	\$ 16,250.00
\$ 5,500,001.00 to \$ 6,000,000.00	\$ 17,500.00
\$ 6,000,001.00 to \$ 6,500,000.00	\$ 18,750.00
\$ 6,500,001.00 to \$ 7,000,000.00	\$ 20,000.00
\$ 7,000,001.00 to \$ 7,500,000.00	\$ 21,250.00
\$ 7,500,001.00 to \$ 8,000,000.00	\$ 22,500.00
\$ 8,000,001.00 to \$ 8,500,000.00	\$ 23,750.00
\$ 8,500,001.00 to \$ 9,000,000.00	\$ 25,000.00
\$ 9,000,001.00 to \$ 9,500,000.00	\$ 26,250.00
\$ 9,500,001.00 to \$10,000,000.00	\$ 27,500.00
\$10,000,001.00 to \$10,500,000.00	\$ 28,750.00
\$10,500,001.00 to \$11,000,000.00	\$ 30,000.00
\$11,000,001.00 to \$11,500,000.00	\$ 31,250.00
\$11,500,001.00 to \$12,000,000.00	\$ 32,500.00
\$12,000,001.00 to \$12,500,000.00	\$ 33,750.00
\$12,500,001.00 to \$13,000,000.00	\$ 35,000.00
\$13,000,001.00 to \$13,500,000.00	\$ 36,250.00
\$13,500,001.00 to \$14,000,000.00	\$ 37,500.00
\$14,000,001.00 to \$14,500,000.00	\$ 38,750.00
\$14,500,001.00 to \$15,000,000.00	\$ 40,000.00
\$15,000,001.00 to \$15,500,000.00	\$ 41,250.00
\$15,500,001.00 to \$16,000,000.00	\$ 42,500.00
\$16,000,001.00 to \$16,500,000.00	\$ 43,750.00
\$16,500,001.00 to \$17,000,000.00	\$ 45,000.00
\$17,000,001.00 to \$17,500,000.00	\$ 46,250.00
\$17,500,001.00 to \$18,000,000.00	\$ 47,500.00
\$18,000,001.00 to \$18,500,000.00	\$ 48,750.00
\$18,500,001.00 to \$19,000,000.00	\$ 50,000.00
\$19,000,001.00 to \$19,500,000.00	\$ 51,250.00
\$19,500,001.00 to \$20,000,000.00	\$ 52,500.00

\$20,000,001.00 to \$20,500,000.00	\$ 53,750.00
\$20,500,001.00 to \$21,000,000.00	\$ 55,000.00
\$21,000,001.00 to \$21,500,000.00	\$ 56,000.00
\$21,500,001.00 to \$22,000,000.00	\$ 57,000.00
\$22,000,001.00 to \$22,500,000.00	\$ 58,000.00
\$22,500,001.00 to \$23,000,000.00	\$ 59,000.00
\$23,000,001.00 to \$23,500,000.00	\$ 60,000.00
\$23,500,001.00 to \$24,000,000.00	\$ 61,000.00
\$24,000,001.00 to \$24,500,000.00	\$ 62,000.00
\$24,500,001.00 to \$25,000,000.00	\$ 63,000.00
\$25,000,001.00 to \$25,500,000.00	\$ 64,000.00
\$25,500,001.00 to \$26,000,000.00	\$ 65,000.00
\$26,000,001.00 to \$26,500,000.00	\$ 66,000.00
\$26,500,001.00 to \$27,000,000.00	\$ 67,000.00
\$27,000,001.00 to \$27,500,000.00	\$ 68,000.00
\$27,500,001.00 to \$28,000,000.00	\$ 69,000.00
\$28,000,001.00 to \$28,500,000.00	\$ 70,000.00
\$28,500,001.00 to \$29,000,000.00	\$ 71,000.00
\$29,000,001.00 to \$29,500,000.00	\$ 72,000.00
\$29,500,001.00 to \$30,000,000.00	\$ 73,000.00
\$30,000,001.00 to \$30,500,000.00	\$ 74,000.00
\$30,500,001.00 to \$31,000,000.00	\$ 75,000.00
\$31,000,001.00 to \$31,500,000.00	\$ 76,000.00
\$31,500,001.00 to \$32,000,000.00	\$ 77,000.00
\$32,000,001.00 to \$32,500,000.00	\$ 78,000.00
\$32,500,001.00 to \$33,000,000.00	\$ 79,000.00
\$33,000,001.00 to \$33,500,000.00	\$ 80,000.00
\$33,500,001.00 to \$34,000,000.00	\$ 81,000.00
\$34,000,001.00 to \$34,500,000.00	\$ 82,000.00
\$34,500,001.00 to \$35,000,000.00	\$ 83,000.00
\$35,000,001.00 to \$35,500,000.00	\$ 84,000.00
\$35,500,001.00 to \$36,000,000.00	\$ 85,000.00
\$36,000,001.00 to \$36,500,000.00	\$ 86,000.00
\$36,500,001.00 to \$37,000,000.00	\$ 87,000.00
\$37,000,001.00 to \$37,500,000.00	\$ 88,000.00
\$37,500,001.00 to \$38,000,000.00	\$ 89,000.00
\$38,000,001.00 to \$38,500,000.00	\$ 90,000.00
\$38,500,001.00 to \$39,000,000.00	\$ 91,000.00
\$39,000,001.00 to \$39,500,000.00	\$ 92,000.00
\$39,500,001.00 to \$40,000,000.00	\$ 93,000.00
\$40,000,001.00 to \$40,500,000.00	\$ 94,000.00
\$40,500,001.00 to \$41,000,000.00	\$ 95,000.00

\$41,000,001.00 to \$41,500,000.00	\$ 96,000.00
\$41,500,001.00 to \$42,000,000.00	\$ 97,000.00
\$42,000,001.00 to \$42,500,000.00	\$ 98,000.00
\$42,500,001.00 to \$43,000,000.00	\$ 99,000.00
\$43,000,001.00 to \$43,500,000.00	\$100,000.00
\$43,500,001.00 to \$44,000,000.00	\$101,000.00
\$44,000,001.00 to \$44,500,000.00	\$102,000.00
\$44,500,001.00 to \$45,000,000.00	\$103,000.00
\$45,000,001.00 to \$45,500,000.00	\$104,000.00
\$45,500,001.00 to \$46,000,000.00	\$105,000.00
\$46,000,001.00 to \$46,500,000.00	\$106,000.00
\$46,500,001.00 to \$47,000,000.00	\$107,000.00
\$47,000,001.00 to \$47,500,000.00	\$108,000.00
\$47,500,001.00 to \$48,000,000.00	\$109,000.00
\$48,000,001.00 to \$48,500,000.00	\$110,000.00
\$48,500,001.00 to \$49,000,000.00	\$111,000.00
\$49,000,001.00 to \$49,500,000.00	\$112,000.00
\$49,500,001.00 to \$50,000,000.00	\$113,000.00

(For amounts above \$50,000,000.00 contact Advisor Kevin L. Schnell)

Fee Calculation for All Clients:

The fee is calculated based on the asset values on December 31st of each calendar year and payable in advance on a quarterly basis which begins with the 1st quarter fee of each year to be assessed. The fee as calculated based on the asset value as of December 31st of each calendar year will be in effect for the 1st, 2nd, 3rd, and 4th quarter following the end of each calendar year. Fees for new clients are based on the asset values upon becoming a client of Schnell Financial Group, LLC and will remain in effect until the end of the calendar year, at which time the December 31st values will be used to determine the next 4 quarters fee. The annual fee for any client may be increased depending on the complexity of the client's financial situation or by agreement of the parties. Individuals and families that were clients of Schnell Financial Group, LLC prior to January 1, 2026 may be subject to a lower fee schedule. Our fees do not include custodial or brokerage fees incurred by clients. Clients may purchase the investment products we recommend through other brokers that are not affiliated with Schnell Financial Group, LLC.

Business Retirement Planning, Risk Management, Business Strategies, Business Succession Planning, Income Tax Planning, Employee Compensation Planning and Business, Farm and Rental related tax preparation.

Fees for business income tax planning, succession planning, other planning strategies and business, farm and rental related tax preparation (Schedule C, F and E Forms and 1120, 1120S and 1065 tax returns) will be determined by the planning and service required and are in addition to the fees above.

Qualified Retirement Plans (401k, Profit Sharing Plans, Pension Plans, Defined Benefit Plans, etc.)

Schnell Financial Group, LLC also provides asset management and pension plan administration to a variety of pension plan types including, but not limited to, Cash Balance Plans, Pension Plans, Profit Sharing Plans and 401(k) plans.

Schnell Financial Group, LLC develops an investment strategy for each individual participant account based on their investment tolerance and goals. Schnell Financial Group, LLC does not use a one size fits all strategy. Each account is individually managed.

For retirement plans, Schnell Financial Group, LLC has a base annual Administration Fee of \$5,000.00 or more depending on the plan selected. The Administration Fee will be determined based on the plan selected, number of participants and other factors affecting administration. Each individual account will be assessed an annual Investment Management fee of 0.50% (1/2 of 1%) of account assets. The Investment Management fee is adjusted at the beginning of each calendar quarter based on the assets under management, and is payable in advance. Part of the administration of the plan may be outsourced to firms specializing in plan administration. All investment management services will be provided by Schnell Financial Group, LLC

The base annual Administration Fee is billed to the plan sponsor. Pension plans that became clients prior to January 1, 2026 may be subject to a lower fee schedule. (Our fees do not include custodial or brokerage fees incurred by clients).

Non-Legacy and Wealth Management Clients

Non-Legacy and Wealth Management clients may pay stated fees or hourly fees based on the actual hours spent by employees of Schnell Financial Group, LLC in providing services to the client. Stated fees and hourly-based fees generally are charged in connection with miscellaneous Financial Advice and tax preparation services. Hourly fees range from \$90.00 to \$450.00 per hour depending on the individual providing the service.

Fee Deduction and General Information About Fees

Schnell Financial Group, LLC clients provide authorization to deduct fees directly from the client's custodial account. The client's custodian sends periodic (at least quarterly) account statements to the client showing all transactions effected in the account during the preceding period, including advisory fees paid to Schnell Financial Group, LLC. We encourage each client to carefully review and verify the accuracy of the fee as listed in the custodial statement.

Client custodians generally will pay the fee as calculated by Schnell Financial Group, LLC and do not independently verify the fee calculations. As set forth above, Schnell Financial Group, LLC strongly encourages each client to review each custodial statement received, and contact the

compliance administrator with any questions or concerns.

Refund of Fees

A client is entitled to a refund if the advisory relationship is terminated before Schnell Financial Group, LLC has provided all the services envisioned at the beginning of the advisory relationship. In such cases, the fee is pro-rated based on the number of days that the client was a client of the firm (for example, if a client prepaid for a quarter, but were a client for only two out of the three months billed, the client will receive a refund equal to one month's worth of fees).

Item 6 - Performance Based Fees and Side by Side Management

Schnell Financial Group, LLC does not manage any performance-based accounts and, as such, neither our firm nor any of our advisory personnel receive performance based fees.

Item 7 - Types of Clients

Schnell Financial Group, LLC provides Legacy and Wealth Management and affiliated services to individuals, pension and/or profit sharing plans, trusts, estates, corporations and other business entities and their owners, members and shareholders. Schnell Financial Group, LLC generally requires a minimum of asset values as stated above.

Item 8 - Methods of Analysis, Investment Strategies and Loss

Schnell Financial Group, LLC may use one or more of the following methods of analysis or investment strategies when providing investment advice to clients:

Fundamental: Involves analyzing individual companies and the industry groups including the 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 stock compared to the current market value. **The risk involved with fundamental analysis is that the individual company performance may exceed or lag the general performance of the overall stock market in the future as fundamental analysis relies on past data or data that may be incorrect.**

Technical: Involves studying past price patterns and trends in the financial markets to predict the direction of the overall market and specific stocks. **The risk involved with technical analysis is a misinterpretation of the data contained in the stock charts and other technical data as well as firm bias as to the direction of the overall market.**

Charting: Involves gathering and processing price and volume information for the security

being analyzed. The price and volume information is analyzed using mathematical equations. The data is then applied to graphing charts, which is used to predict future price movements based on price patterns and trends. **The risk involved with charting is a misinterpretation of the data contained in the stock chart and other technical data for a particular stock.**

Investing in Securities involves risk of loss, that as a client, you should be prepared to bear.

Equity Securities: Schnell Financial Group, LLC will make what are anticipated to be both long term purchases, generally to be held for longer than one year; short term purchases, generally to be held less than one year; short sales, which involve a securities transaction in which an investor will profit if the stock goes down in price; margin transactions, a transaction where the investor borrows money to purchase a security; and option transactions, which is a contract which gives the owner the right, but not the obligation, to buy or sell an underlying asset or instrument at a specified price on or before a specified date. The seller incurs a corresponding obligation to sell or buy, if the long holder elects to exercise the option prior to expiration. The buyer pays a premium to the seller for this right. An option which conveys the right to buy something at a specific price is called a “call” and an option which conveys the right to sell something at a specific price is called a “put”.

Bonds: Schnell Financial Group, LLC will make purchases of individual bonds based on the underlying financial outlook.

Exchange Traded Funds: Schnell Financial Group, LLC purchases exchange traded funds for client accounts. Funds that invest in equities and bonds (domestic and international), gold, silver, other commodities may be considered for purchase.

Mutual Funds: Schnell Financial Group, LLC does not make substantial purchases of mutual funds due to the generally higher fees associated with mutual funds. We prefer to use exchange traded funds due to generally lower fees and ability to trade throughout the day.

In addition, current and anticipated economic cycles and macroeconomic changes are monitored in order to allocate portions of the client’s investment assets into areas of future growth. Economic factors such as the supply of money, varying interest rates, and changes in inflation are analyzed to help project the future economic environment. Political factors are considered in those areas that impact the overall economic environment. All investments described above involve a risk of loss.

Income tax and legal considerations are important in investment planning. However, it is essential to recognize that investment return is of prime importance. Income tax and legal considerations are not the primary consideration in investment decisions. Advisor, Kevin L. Schnell, is also a Certified Public Accountant and Attorney. Any conflict in providing investment, tax/accounting and legal advice will be described to and discussed with the client to

resolve any issues. Conflicts can also arise between the clients (husband and wife or between unrelated clients of the advisor) where the interests of the clients are not the same. In addition to the Advisor, Kevin L. Schnell, acting in the capacity of a fiduciary in performing investment services for the clients, the Advisor must also act as a fiduciary in performance of legal services. As a CPA, the Advisor is not strictly held to the fiduciary standard but the AICPA Professional Code of Conduct requires the attributes of objectivity, integrity, free of conflicts of interest, and truthfulness. When a conflict arises, the Advisor will meet with all clients in an attempt to resolve all conflicts. If the conflicts can not be resolved, the Advisor may be required to terminate the relationship with the client or clients.

Item 9 -Disciplinary Information

No Disciplinary Actions have been instituted against Schnell Financial Group, LLC or any of its employees.

Item 10 - Other Financial Industry Activities and Affiliations

Neither Schnell Financial Group, LLC, nor its representatives, are registered or have an application pending to register, as a broker-dealer or a registered representative of a broker-dealer.

Neither Schnell Financial Group, LLC, nor its representatives, are registered or have an application pending to register, as a futures commission merchant, commodity pool operator, a commodity trading advisor, or a representative of the foregoing.

Schnell Financial Group, LLC does not have any relationship or arrangement that is material to its advisory business or to its clients with any related person, other than with the law firm of Kevin L. Schnell - Attorney at Law, LLC, which is further disclosed elsewhere in this brochure.

Schnell Financial Group, LLC does not recommend or select other investment advisors for its clients.

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

Schnell Financial Group, LLC maintains an investment policy relative to personal securities transaction. This investment policy is part of Schnell Financial Group, LLC's overall Code of Ethics, which serves to establish a standard of business conduct for all of Schnell Financial Group, LLC's Representatives that is based upon fundamental principles of openness, integrity, honesty, and trust.

In accordance with Section 204 A of the Investment Advisors Act of 1940, Schnell Financial Group, LLC also maintains and enforces written policies reasonably designed to prevent the

misuse of material non-public information by Schnell Financial Group, LLC or any person associated with Schnell Financial Group, LLC.

Neither Schnell Financial Group, LLC nor any related person of Schnell Financial Group, LLC recommends, buys, or sells for client accounts, securities in which Schnell Financial Group, LLC or any related person of Schnell Financial Group, LLC has a material financial interest.

Schnell Financial Group, LLC and/or representatives of Schnell Financial Group, LLC may buy or sell securities that are also recommended to clients. This practice may create a situation where Schnell Financial Group, LLC and/or representatives of the firm are in a position to materially benefit from the sale or purchase of those securities. Therefore, this situation creates a potential conflict of interest. Practices such as “scalping” (i.e., a practice whereby the owner of shares of a security recommends that security for investment and then immediately sells it at a profit upon the rise in the market price which follows the recommendation) could take place if Schnell Financial Group, LLC did not have adequate policies in place to detect such activities. In addition, this requirement can help detect insider trading, “front-running” (i.e., personal trades executed prior to those of Schnell Financial Group, LLC’s clients). However, the investments Schnell Financial Group, LLC recommends for clients and that are purchased by the representatives are publically traded and the effect of the personal trades are unlikely to affect the price of the investment.

Schnell Financial Group, LLC and/or representatives of Schnell Financial Group, LLC may buy or sell securities, at or around the same time as those securities are recommended to clients. This practice creates a situation where Schnell Financial Group, LLC and/or representatives of the firm are in a position to materially benefit from the sale or purchase of those securities. Therefore, this situation creates a potential conflict of interest. As indicated above, the investments Schnell Financial Group, LLC recommends for clients and that are purchased by the representatives are publically traded and the effect of the personal trades are unlikely to affect the price of the investment.

Item 12 - Brokerage Practices

Recommendation of Custodian(s)

The Client will select the broker-dealer or custodian (herein the "Custodian") to safeguard Client assets. The Client will authorize Schnell Financial Group, LLC to direct trades to this Custodian as agreed in the Legacy and Wealth Management Agreement. While Schnell Financial Group, LLC does not exercise discretion over the selection of the Custodian, it may recommend a custodian to Clients for execution and/or custodial services. Clients are not obligated to use the Custodian recommended by Schnell Financial Group, LLC. Schnell Financial Group, LLC will not charge additional fees for using a Custodian not recommended by Schnell Financial Group, LLC. There may be additional fees or costs charged by the Custodian. Schnell Financial Group, LLC may recommend a Custodian based on criteria such as, but not limited to, reasonableness of

commissions charged to the Client and services provided to the Client.

If the Client does not request the use of a particular Custodian, Schnell Financial Group, LLC typically recommends to Clients that they establish their brokerage accounts at Charles Schwab & Co., Inc. Charles Schwab & Co., Inc. is an independent and unaffiliated SEC-registered broker-dealer and FINRA member. Charles Schwab & Co., Inc. offers independent investment advisers certain services, which include custody of securities, trade execution, clearance and settlement of transactions. Schnell Financial Group, LLC participates in the Charles Schwab & Co., Inc. program for independent investment advisors. Schnell Financial Group, LLC receives some benefits from Charles Schwab & Co., Inc. through its participation in the program. Schnell Financial Group, LLC does not have the discretionary authority to negotiate commissions on behalf of our Clients on a trade-by-trade basis.

Schnell Financial Group, LLC considers a number of factors in selecting and/or recommending brokers and custodians for its Clients' accounts, including, but not limited to, execution capability, experience and financial stability, reputation and the quality of services provided. Schnell Financial Group, LLC is not affiliated with, or related to, Charles Schwab & Co., Inc.

Although not a material consideration when determining whether to recommend that a Client utilize the services of a particular broker-dealer/custodian, Schnell Financial Group, LLC may receive, without cost, or at a discount, support services and/or products, certain of which assist Schnell Financial Group, LLC to better monitor and service Client accounts maintained at such institutions. Included within the support services that may be obtained by Schnell Financial Group, LLC may be investment-related research, pricing information and market data, software and other technology that provide access to Client account data, compliance and/or practice management-related publications, discounted or free consulting services, discounted and/or free attendance at conferences, meetings, and other educational and/or social events, marketing support, computer software or other products used by Schnell Financial Group, LLC in furtherance of its business operations.

As indicated above, certain of the support services and/or products that may be received may assist Schnell Financial Group, LLC in managing and administering Client accounts. Others do not directly provide such assistance, but rather assist Schnell Financial Group, LLC to manage and further develop its business enterprise. As part of its fiduciary duties to clients, Schnell Financial Group, LLC endeavors at all times to put the interests of its clients first. Clients should be aware, however, that the receipt of economic benefit by Schnell Financial Group, LLC or its related persons in and of itself creates a potential conflict of interest and may indirectly influence Schnell Financial Group, LLC's choice of Charles Schwab & Co., Inc. for custody and brokerage services. Schnell Financial Group, LLC's Clients do not pay more for investment transactions and/or assets maintained at Charles Schwab & Co., Inc. as result of this arrangement. There is no corresponding commitment made by Schnell Financial Group, LLC to Charles Schwab & Co., Inc. or any other entity to invest any specific amount or percentage of Client assets in any specific stocks, bonds, exchange traded funds (ETF's), mutual funds, or other investment products as

result of the above arrangement.

Soft Dollars

Soft dollars are revenue programs offered by broker-dealers whereby an adviser enters into an agreement to place security trades with the broker in exchange for research and other services. Schnell Financial Group, LLC does not participate in soft dollar programs sponsored or offered by any broker-dealer. However, in an effort to keep our clients informed as to the services we offer and the various financial products we utilize, our employees may attend conferences or events subsidized by product providers. These events/trips are educational in nature, and are not dependent upon the use of any specific products. While a conflict of interest may exist given that these events/trips are at least partially funded by product sponsors, we will always adhere to our fiduciary duties in selecting appropriate investments for our clients.

Brokerage Referrals

Schnell Financial Group, LLC does not receive any compensation from Charles Schwab & Co., Inc. or any other entity in connection with the recommendation for establishing a brokerage account.

Directed Brokerage

All Clients are serviced on a “directed brokerage basis”, where Schnell Financial Group, LLC will place trades within the established accounts at the Custodian designated by the Client. The Adviser will not engage in any principal transactions (i.e., trade of any security from or to the Adviser’s own account) or cross transactions with other Client accounts (i.e., purchase of a security into one Client account from another Client’s accounts). The Client selects the Custodian and Schnell Financial Group, LLC will not be obligated to select competitive bids on securities transactions and does not have an obligation to seek the lowest available transaction costs. These costs are determined by the designated Custodian.

Aggregating and Allocating Trades

The primary objective in placing orders for the purchase and sale of securities for Client accounts is to obtain the most favorable net results taking into account such factors as (1) price, (2) size of order, (3) difficulty of execution, (4) confidentiality and (5) skill required of the broker. Schnell Financial Group, LLC will execute its transactions through an unaffiliated broker-dealer selected by the Client. Schnell Financial Group, LLC may aggregate orders in a block trade or trades when securities are purchased or sold through the same broker-dealer for multiple (discretionary) accounts. If a block trade cannot be executed in full at the same price or time, the securities actually purchased or sold by the close of each business day must be allocated in a manner that is consistent with the initial pre-allocation or other written statement. This must be done in a way that does not consistently advantage or disadvantage particular Client accounts.

Item 13 - Review of Accounts

Account review meetings are conducted on an ongoing basis by Schnell Financial Group, LLC, generally on a semi-annual basis. Account review meetings are agreed to between Schnell Financial Group, LLC and the Client. In addition to review meetings, Schnell Financial Group, LLC will communicate through other means such as e-mail, regular mail and phone calls. During the client meetings or communication via e-mail, regular mail and phone calls, the information presented may be by written report, viewed on-line through the Charles Schwab & Co., Inc. website, Morningstar Client website, E-Money website, or other means.

Item 14 - Client Referrals and Other Compensation

Schnell Financial Group, LLC does not compensate any individual or firm for referrals. Schnell Financial Group, LLC does not receive compensation for referrals to any other individual or firm. Schnell Financial Group, LLC does not receive compensation from any source other than the client.

Item 15 - Custody

Schnell Financial Group, LLC is deemed to have custody when it is given the ability to have clients' advisory fees debited by the custodian from the client's account. In all cases, clients are provided with transaction confirmation notices and regular summary account statements directly from the broker-dealer/custodian for the client accounts, which they should carefully review.

Item 16 - Investment Discretion

The client can engage Schnell Financial Group, LLC to provide investment advisory services on a discretionary basis. The Client will select the Custodian for the custody of the assets. Prior to Schnell Financial Group, LLC assuming discretionary authority over a client's account, the client shall be required to execute a Legacy and Wealth Management Agreement, naming Schnell Financial Group, LLC as the client's limited power of attorney granting Schnell Financial Group, LLC full authority to buy, sell, or otherwise effect investment transactions involving the assets in the Client's name. The discretionary authority may be restricted by the client in writing and given to Schnell Financial Group, LLC.

Item 17 - Voting Client Securities

Schnell Financial Group, LLC does not vote client proxies. Clients will receive their proxies or other solicitations directly from their custodian. Clients may contact Schnell Financial Group, LLC to discuss any questions they may have with a particular solicitation.

Item 18 - Financial Information

Schnell Financial Group, LLC does not solicit fees of more than \$500.00, per client, for six months or more in advance. Schnell Financial Group, LLC does assess investment advisory fees at the beginning of each quarter (3 months) for upcoming calendar quarter. Schnell Financial Group, LLC is unaware of any financial condition that is reasonably likely to impair its ability to meet its contractual commitments relating to its discretionary authority over certain client accounts.

Item 19 - Requirements for State Registered Advisors

Schnell Financial Group, LLC is owned by Kevin L. Schnell , JD, CPA, CFP® and Wanda S. Schnell. Both Kevin L. Schnell, JD, CPA, CFP® and Wanda S. Schnell are control persons. Neither Kevin L. Schnell or Wanda S. Schnell are engaged in any other business other than Schnell Financial Group, LLC or Kevin L. Schnell-Attorney at Law, LLC. See Part 2B of Form ADV for additional information on Supervised Persons.

Item 1 - Cover Page

**SUPERVISED PERSON:
KEVIN L. SCHNELL
821 THOMPSON BLVD.
SEDALIA, MISSOURI 65301
(660) 826-4778
CRD NUMBER: 1171829**

**SCHNELL FINANCIAL GROUP, LLC
821 THOMPSON BLVD.
SEDALIA, MISSOURI 65301
(660) 826-4778
CRD NUMBER: 137969**

**BROCHURE SUPPLEMENT
Part 2B of Form ADV
April 8, 2026**

Contact: Kevin L. Schnell, Compliance Administrator
821 Thompson Blvd.
Sedalia, Missouri 65301
www.schnellfinancialgroup.com

This brochure supplement provides information about Kevin L. Schnell that supplements the Schnell Financial Group, LLC brochure. You should have received a copy of that brochure. Please contact Kevin L. Schnell, Compliance Administrator, if you did not receive the Schnell Financial Group, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Kevin L. Schnell is available at the SEC's website at www.adviserinfo.sec.gov.

Registration as an investment advisor does not imply a certain level of skill or training

Item 2 - Educational Background and Business Experience

Kevin L. Schnell, JD, CPA, CFP®

CRD# 1171829

Born on August 24, 1955

Education and Certifications:

Certified Financial Planner (TM) Certificant	1987 to Present
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Bachelor of Science in Business Administration-Accounting, University of Central Missouri (then Central Missouri State University, Warrensburg, MO 64093).	August, 1989
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Juris Doctor (JD) degree from the University of Missouri - Columbia School of Law.	December, 1993
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Has been in practice as an Attorney since April 1994 in the State of Missouri and the State of Kansas since 1998. Practice is limited to Estate Planning, Tax planning and limited Business and Corporate Law.	Missouri-1994 Kansas-1998
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Has been licensed as a Certified Public Accountant in the State of Missouri since 2005.	Missouri-2005
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Requirements to become and remain a Certified Financial Planner (TM) Certificant/CFP®:

Kevin L. Schnell began the CFP® program in 1985. At that time, applicants had to pass six exams. Exams were given every 4 months for a minimum of 2 years to pass all requirements to become a CFP®.

To ensure that CFP® professionals remain well-versed in comprehensive financial planning once they have attained CFP® certification, CFP® professionals are required to complete 30 credit hours of continuing education (CE) accepted by CFP Board every two years, including 2 hours of CFP Board-approved Ethics CE.

Requirements to become and remain a Certified Public Accountant:

In Missouri, an individual applying to become a CPA must have a bachelor's degree in Accounting with 150 educational hours from an accredited post-secondary school. This means that in addition to the 120 hours a bachelor's degree requires, applicants must obtain an additional 30 hours of upper-division coursework in tax, accounting or business. In Missouri, applicants must be 21 years old, and have 33 semester hours in accounting, with 1 course in auditing and 18 hours in upper-level accounting. Applicants must also have 27 semester hours in general business courses such as management, economics, marketing, and finance.

Anyone who wishes to become a CPA in Missouri and the United States, must sit for and pass the Uniform Certified Public Accountant Examination (Uniform CPA Exam). The American Institute of Certified Public Accountants (AICPA) is the body that creates and regulates the exam, and National Association of State Boards of Accountancy (NASBA) administers it in each state.

The Uniform CPA Exam is the same, or uniform, in every state, however, the requirements for being eligible to sit for the exam, and subsequently passing, determines if the applicant can be licensed in their state.

CPAs in Missouri (and all states) must complete continuing professional education (CPE) hours to maintain their CPA license. Specific to Missouri, CPAs must report at least 40 hours annually, including ethics, every year.

Requirements to become and remain a licensed Attorney:

To become an Attorney in the State of Missouri or the State of Kansas, an individual must have obtained a Juris Doctor (JD) degree from an ABA Accredited Law School. The JD degree generally requires 3 years of full-time attendance. An individual must also have obtained a Bachelor of Science or Bachelor of Arts degree prior to attending law school.

In Missouri and Kansas, individuals must pass the 2 day bar exam. Reciprocity is available for Attorney's licensed in either state, but Kevin L. Schnell has passed the exam in both states.

After being admitted to the Missouri bar, an individual must complete two hours of ethics courses within the first 12 months of licensure. All Missouri bar members must complete 15 hours of mandatory continuing legal education (MCLE) each year, and this must include two hours of ethics, professionalism, or malpractice prevention.

The Kansas CLE Commission (KSCLE) regulates Continuing Legal Education (CLE) for Kansas Attorneys. An Attorney must complete 12 CLE hours annually, including two hours of ethics.

Business Background:

Schnell Financial Group, LLC*	1989 to Present
Kevin L. Schnell-Attorney at Law, LLC**	2009 to Present
Operated law practice as Sole Proprietor	1994 to 2009
Member of MHC Certified Public Accountants, LLC	2009 to 2012
Member of Fears, Case-Harmon & Schnell, LLC*** (Certified Public Accountants)	2005 to 2009
Member of Schnell Insurance Agency, LLC	1982 to 2008
Representative for Lutheran Brotherhood (now Thrivent Financial)	1982 to 1990
Insurance Agent for Shelter Insurance	1979 to 1982

(*Schnell Financial Group, LLC had previously operated under the names of Comprehensive Accounting & Tax, LLC and Schnell Tax Service, LLC. Legacy and Wealth Management services had been previously offered through MHC Asset Management, LLC, which previously operated as FSA Wealth Strategies, LLC and Capital Asset Advisors)

(** Kevin L. Schnell-Attorney at Law, LLC had previously operated under the name of MHC Law Group, LLC)

(***Fears, Case-Harmon & Schnell, LLC had previously operated under the name of Fears, Schnell and Associates, CPA's, LLC)

Licenses and Industry Exams:

Uniform Securities Agent State Law Examination (S63)	Series 63	08/26/1983
Uniform Investment Adviser Law Examination (S65)	Series 65	09/03/2008
State of Missouri Insurance License-Life		05/11/1979
State of Missouri Insurance License-Accident and Health		05/11/1979
State of Missouri Insurance License-Property		06/08/1979
State of Missouri Insurance License-Casualty		06/08/1979
State of Missouri Insurance License-Life Variable Contract		04/06/1987

Kevin L. Schnell maintains his insurance license which requires 16 hours of continuing education, including 3 hours of ethics, every 2 years. Neither Kevin L. Schnell or Schnell Financial Group, LLC sell insurance products or receive commission on any insurance product.

Item 3 - Disciplinary Information

No Disciplinary Actions have been instituted against Kevin L. Schnell. In addition to being a member of Schnell Financial Group, LLC, Kevin L. Schnell is a member of Kevin L. Schnell-Attorney at Law, LLC and actively practices as an Attorney. In 2015, a beneficiary of an estate filed a lawsuit against Kevin L. Schnell alleging breach of fiduciary duty to the beneficiary. An agreement to settle the lawsuit was reached in 2020.

Item 4 - Other Business Activities

Kevin L. Schnell is not engaged in any other business, including investment related businesses or occupation other than Schnell Financial Group, LLC and Kevin L. Schnell-Attorney at Law, LLC.

Item 5 - Additional Compensation

Kevin L. Schnell receives no compensation or income other than from Schnell Financial Group, LLC and Kevin L. Schnell-Attorney at Law, LLC.

Item 1 - Cover Page

**SUPERVISED PERSON:
WANDA S. SCHNELL
821 THOMPSON BLVD.
SEDALIA, MISSOURI 65301
(660) 826-4778**

**SCHNELL FINANCIAL GROUP, LLC
821 THOMPSON BLVD.
SEDALIA, MISSOURI 65301
(660) 826-4778
CRD NUMBER: 137969**

**BROCHURE SUPPLEMENT
Part 2B of Form ADV
April 7, 2026**

Contact: Kevin L. Schnell, Compliance Administrator
821 Thompson Blvd.
Sedalia, Missouri 65301
www.schnellfinancialgroup.com

This brochure supplement provides information about Wanda S. Schnell that supplements the Schnell Financial Group, LLC brochure. You should have received a copy of that brochure. Please contact Kevin L. Schnell, Compliance Administrator, if you did not receive the Schnell Financial Group, LLC's brochure or if you have any questions about the contents of this supplement.

Item 2 - Educational Background and Business Experience

Wanda S. Schnell

Born on March 14, 1961

Wanda S. Schnell is listed as a supervised person as she is considered a control person of Schnell Financial Group, LLC. Wanda S. Schnell has a 49% ownership interest in Schnell Financial Group, LLC. Wanda S. Schnell is not an Advisor with Schnell Financial Group, LLC. Wanda S. Schnell does engage in tax preparation through Schnell Financial Group, LLC and as paralegal for Kevin L. Schnell-Attorney at Law, LLC.

Education and Certifications:

Wanda S. Schnell does not have formal education extending beyond high school

Business Background:

Schnell Financial Group, LLC* (Tax Preparer and LLC Member)	1989 to Present
Kevin L. Schnell-Attorney at Law, LLC** (Paralegal)	2009 to Present
Kevin L. Schnell-Attorney (Paralegal)	1994 to 2009
Member of Schnell Insurance Agency, LLC (Insurance Agent)	1982 to 2008

(*Schnell Financial Group, LLC had previously operated under the names of Comprehensive Accounting & Tax, LLC and Schnell Tax Service, LLC. Legacy and Wealth Management services had been previously offered through MHC Asset Management, LLC, which previously operated as FSA Wealth Strategies, LLC and Capital Asset Advisors)

(** Kevin L. Schnell-Attorney at Law, LLC had previously operated under the name of MHC Law Group, LLC)

Licenses and Industry Exams:

None

Neither Wanda S. Schnell or Schnell Financial Group, LLC sell insurance products or receive commission on any insurance product.

Item 3 - Disciplinary Information

No Disciplinary Actions have been instituted against Wanda S. Schnell.

Item 4 - Other Business Activities

Wanda S. Schnell is not engaged in any other business, including investment related businesses or occupation other than Schnell Financial Group, LLC and Kevin L. Schnell-Attorney at Law, LLC.

Item 5 - Additional Compensation

Wanda S. Schnell receives no compensation or income other than from Schnell Financial Group, LLC or Kevin L. Schnell-Attorney at Law, LLC.

Item 1 - Cover Page

**SUPERVISED PERSON:
KEATON G. SCHNELL
821 THOMPSON BLVD.
SEDALIA, MISSOURI 65301
(660) 826-4778
CRD NUMBER: 7458331**

**SCHNELL FINANCIAL GROUP, LLC
821 THOMPSON BLVD.
SEDALIA, MISSOURI 65301
(660) 826-4778
CRD NUMBER: 137969**

**BROCHURE SUPPLEMENT
Part 2B of Form ADV
April 7, 2026**

Contact: Kevin L. Schnell, Compliance Administrator
821 Thompson Blvd.
Sedalia, Missouri 65301
www.schnellfinancialgroup.com

This brochure supplement provides information about Kevin L. Schnell that supplements the Schnell Financial Group, LLC brochure. You should have received a copy of that brochure. Please contact Kevin L. Schnell, Compliance Administrator, if you did not receive the Schnell Financial Group, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Kevin L. Schnell is available at the SEC's website at www.adviserinfo.sec.gov.

Registration as an investment advisor does not imply a certain level of skill or training

Item 2 - Educational Background and Business Experience

Keaton G. Schnell

CRD# 7458331

Born on March 30, 1992

Education and Certifications:

Bachelor of Science in Business Administration-Ag Finance University of Missouri Columbia, Missouri	May 2015
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Business Background:

Schnell Financial Group, LLC	2016 to Present
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Licenses and Industry Exams:

Uniform Investment Adviser Law Examination (S65)	Series 65	07/29/2021
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Item 3 - Disciplinary Information

No Disciplinary Actions have been instituted against Keaton G. Schnell.

Item 4 - Other Business Activities

Keaton G. Schnell is a Police Officer for the Sedalia, Missouri Police Department.

Item 5 - Additional Compensation

Keaton G. Schnell receives no compensation or income other than from Schnell Financial Group, LLC and the City of Sedalia.

Item 1 - Cover Page

**SUPERVISED PERSON:
KLOE' D. SCHNELL
821 THOMPSON BLVD.
SEDALIA, MISSOURI 65301
(660) 826-4778
CRD NUMBER: 7458331**

**SCHNELL FINANCIAL GROUP, LLC
821 THOMPSON BLVD.
SEDALIA, MISSOURI 65301
(660) 826-4778
CRD NUMBER: 137969**

**BROCHURE SUPPLEMENT
Part 2B of Form ADV
April 7, 2026**

Contact: Kevin L. Schnell, Compliance Administrator
821 Thompson Blvd.
Sedalia, Missouri 65301
www.schnellfinancialgroup.com

This brochure supplement provides information about Kevin L. Schnell that supplements the Schnell Financial Group, LLC brochure. You should have received a copy of that brochure. Please contact Kevin L. Schnell, Compliance Administrator, if you did not receive the Schnell Financial Group, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Kevin L. Schnell is available at the SEC's website at www.adviserinfo.sec.gov.

Registration as an investment advisor does not imply a certain level of skill or training

Item 2 - Educational Background and Business Experience

Kloe' D. Schnell

CRD# 8183188

Born on April 3, 2000

Education and Certifications:

Juris Doctor (JD)-University of Missouri-Kansas City	May 2025
Master of Arts/Bachelor of Science in Business Administration-Accounting	May 2022
University of Central Missouri-Warrensburg, Missouri	

Business Background:

Schnell Financial Group, LLC	August 2025 to Present
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Licenses and Industry Exams:

Uniform Investment Adviser Law Examination (S65)	Series 65	12/01/2025
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Item 3 - Disciplinary Information

No Disciplinary Actions have been instituted against Kloe' D. Schnell.

Item 4 - Other Business Activities

Kloe' D. Schnell is also an associate Attorney with Kevin L. Schnell-Attorney at Law, LLC.

Item 5 - Additional Compensation

Kloe' D. Schnell receives no compensation or income other than from Schnell Financial Group, LLC and Kevin L. Schnell-Attorney at Law, LLC.