



IAPD Report

JENA ELIZABETH SCHUSTER

CRD# 3070897

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Please contact FINRA with any concerns.



IAPD Information About Representatives

IAPD offers information on all current-and many former representatives. Investors are strongly encouraged to use IAPD to check the background of representatives before deciding to conduct, or continue to conduct, business with them.

What is included in a IAPD report?

IAPD reports for individual representatives include information such as employment history, professional qualifications, disciplinary actions, criminal convictions, civil judgments and arbitration awards.

It is important to note that the information contained in an IAPD report may include pending actions or allegations that may be contested, unresolved or unproven. In the end, these actions or allegations may be resolved in favor of the representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

Where did this information come from?

The information contained in IAPD comes from the Investment Adviser Registration Depository (IARD) and FINRA's Central Registration Depository, or CRD, (see more on CRD below) and is a combination of:

- information the states require representatives and firms to submit as part of the registration and licensing process, and
- information that state regulators report regarding disciplinary actions or allegations against representatives.

How current is this information?

Generally, representatives are required to update their professional and disciplinary information in IARD within 30 days.

Need help interpreting this report?

For help understanding how to read this report, please consult NASAA's IAPD Tips page <http://www.nasaa.org/IAPD/IARReports.cfm>

What if I want to check the background of an Individual Broker or Brokerage Firm?

To check the background of an Individual Broker or Brokerage firm, you can search for the firm or individual in IAPD. If your search is successful, click on the link provided to view the available licensing and registration information in FINRA's BrokerCheck website.

Are there other resources I can use to check the background of investment professionals?

It is recommended that you learn as much as possible about an individual representative or Investment Adviser firm before deciding to work with them. Your state securities regulator can help you research individuals and certain firms doing business in your state. The contact information for state securities regulators can be found on the website of the North American Securities Administrators Association <http://www.nasaa.org>



Report Summary

JENA ELIZABETH SCHUSTER (CRD# 3070897)

The report summary provides an overview of the representative's professional background and conduct. The information contained in this report has been provided by the representative, investment adviser and/or securities firms, and/or securities regulators as part of the states' investment adviser registration and licensing process. The information contained in this report was last updated by the representative, a previous employing firm, or a securities regulator on **07/22/2025**.

CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
IA	IGNITE PLANNERS LLC	CRD# 289797	01/28/2019
B	STONEX SECURITIES INC.	CRD# 18456	04/01/2019

QUALIFICATIONS

This representative is currently registered in **1** SRO(s) and **24** jurisdiction(s).

Is this representative currently Inactive or Suspended with any regulator? **No**

Note: Not all jurisdictions require IAR registration or may have an exemption from registration.

Additional information including this individual's qualification examinations and professional designations is available in the Detailed Report.

REGISTRATION HISTORY

This representative was previously registered with the following firm(s):

	FIRM	CRD#	LOCATION	REGISTRATION DATES
IA	SB WEALTH	108126	SAN CLEMENTE, CA	11/20/2018 - 11/28/2022
B	CETERA ADVISOR NETWORKS LLC	13572	SAN CLEMENTE, CA	11/01/2017 - 04/04/2019
IA	CETERA ADVISOR NETWORKS LLC	13572	SAN CLEMENTE, CA	09/19/2017 - 04/04/2019

For additional registration and employment history details as reported by the individual, refer to the Registration and Employment History section of the Detailed Report.

DISCLOSURE INFORMATION

Disclosure events include certain criminal charges and convictions, formal investigations and disciplinary actions initiated by regulators, customer disputes and arbitrations, and financial disclosures such as bankruptcies and unpaid judgments or liens.

Are there events disclosed about this representative? **Yes**

The following types of events are disclosed about this representative:

Type	Count
Customer Dispute	1



Qualifications

REGISTRATIONS

This section provides the SRO, states and U.S. territories in which the representative is currently registered and licensed, the category of each registration, and the date on which the registration becomes effective. This section also provides, for each firm with which the representative is currently employed, the address of each location where the representative works. This individual is currently registered with **24** jurisdiction(s) and 1 SRO(s) through his or her employer(s).

Employment 1 of 2

Firm Name: **STONEX SECURITIES INC.**
Main Address: 2 PERIMETER PARK SOUTH
SUITE 500 WEST
BIRMINGHAM, AL 35243
Firm ID#: 18456

	Regulator	Registration	Status	Date
B	FINRA	General Securities Representative	Approved	04/01/2019
B	Arizona	Agent	Approved	04/01/2019
B	Arkansas	Agent	Approved	04/01/2019
B	California	Agent	Approved	04/01/2019
B	Colorado	Agent	Approved	04/01/2019
B	Florida	Agent	Approved	04/01/2019
B	Georgia	Agent	Approved	01/02/2020
B	Hawaii	Agent	Approved	04/01/2019
B	Idaho	Agent	Approved	04/01/2019
B	Louisiana	Agent	Approved	01/02/2020
B	Missouri	Agent	Approved	01/03/2024
B	Montana	Agent	Approved	04/01/2019
B	Nevada	Agent	Approved	04/01/2019



Qualifications

Regulator	Registration	Status	Date
B New Jersey	Agent	Approved	04/01/2019
B New Mexico	Agent	Approved	01/03/2024
B New York	Agent	Approved	04/01/2019
B North Carolina	Agent	Approved	04/12/2019
B North Dakota	Agent	Approved	04/01/2019
B Ohio	Agent	Approved	04/01/2019
B Oregon	Agent	Approved	04/01/2019
B Tennessee	Agent	Approved	04/01/2019
B Texas	Agent	Approved	04/01/2019
B Washington	Agent	Approved	04/01/2019
B Wisconsin	Agent	Approved	01/03/2024
B Wyoming	Agent	Approved	01/03/2024

Branch Office Locations

109 E ESCALONES
SAN CLEMENTE, CA 92672

Employment 2 of 2

Firm Name: **IGNITE PLANNERS LLC**
Main Address: 109 E. ESCALONES
SAN CLEMENTE, CA 92672
Firm ID#: 289797

Regulator	Registration	Status	Date
IA California	Investment Adviser Representative	Approved	01/28/2019



Qualifications

Regulator	Registration	Status	Date
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Branch Office Locations

IGNITE PLANNERS LLC
109 E. Escalones
San Clemente, CA 92672



Qualifications

PASSED INDUSTRY EXAMS

This section includes all industry exams that the representative has passed. Under limited circumstances, a representative may attain registration after receiving an exam waiver based on a combination of exams the representative has passed and qualifying work experience. Likewise a new exam requirement may be grandfathered based on a representative's specific qualifying work experience. Exam waivers and grandfathering are not included below.

This individual has passed 0 principal/supervisory exams, 2 general industry/product exams, and 2 state securities law exams.

Principal/Supervisory Exams

Exam	Category	Date
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No information reported.

General Industry/Product Exams

Exam	Category	Date
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B Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
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B General Securities Representative Examination (S7)	Series 7	04/11/2005
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State Securities Law Exams

Exam	Category	Date
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IA B Uniform Combined State Law Examination (S66)	Series 66	06/27/2005
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B Uniform Securities Agent State Law Examination (S63)	Series 63	09/14/1998
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PROFESSIONAL DESIGNATIONS

This section details that the representative has reported **0** professional designation(s).

No information reported.



Registration & Employment History

PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

	Registration Dates	Firm Name	ID#	Branch Location
IA	11/20/2018 - 11/28/2022	SB WEALTH	CRD# 108126	SAN CLEMENTE, CA
B	11/01/2017 - 04/04/2019	CETERA ADVISOR NETWORKS LLC	CRD# 13572	SAN CLEMENTE, CA
IA	09/19/2017 - 04/04/2019	CETERA ADVISOR NETWORKS LLC	CRD# 13572	SAN CLEMENTE, CA
IA	06/30/2005 - 11/01/2017	GIRARD SECURITIES, INC.	CRD# 18697	SAN DIEGO, CA
B	04/12/2005 - 11/01/2017	GIRARD SECURITIES, INC.	CRD# 18697	SAN DIEGO, CA

EMPLOYMENT HISTORY

Below is the representative's employment history for up to the last 10 years.

Employment Dates	Employer Name	Position	Investment Related	Employer Location
04/2019 - Present	STONEX SECURITIES INC.	REGISTERED REP	Y	SAN CLEMENTE, CA, United States
11/2017 - Present	IGNITE PLANNERS, LLC	Partner and CEO	Y	MISSION VIEJO, CA, United States
08/2017 - 11/2022	RINCON PACIFIC MANAGEMENT, INC.	Owner and Chief Compliance Officer	Y	MISSION VIEJO, CA, United States
11/2017 - 04/2019	CETERA ADVISOR NETWORKS LLC	REGISTERED REPRESENTATIVE/IA R	Y	EL SEGUNDO, CA, United States
09/2017 - 11/2017	CETERA ADVISOR NETWORKS LLC	IAR	Y	EL SEGUNDO, CA, United States
02/2004 - 11/2017	GIRARD SECURITIES INC.	REGISTERED REPRESENTATIVE/IA R	Y	SAN DIEGO, CA, United States

OTHER BUSINESS ACTIVITIES

This section includes information, if any, as provided by the representative regarding other business activities the representative is currently engaged in either as a proprietor, partner, officer, director, employee, trustee, agent, or otherwise. This section does not include non-investment related activity that is exclusively charitable, civic, religious, or fraternal and is recognized as tax exempt.

1.NAME OF OTHER BUSINESS: SB WEALTH



Registration & Employment History



OTHER BUSINESS ACTIVITIES

INVESTMENT RELATED: YES

ADDRESS: SAME AS REGISTERED LOCATION

NATURE OF BUSINESS: FINANCIAL SERVICES

START DATE: 04/2017

POSITION/TITLE/RELATIONSHIP: CHIEF INVESTMENT OFFICER

APX NUMBER OF HOURS PER WEEK: 40

APX NUMBER OF HOURS DURING TRADING HOURS: 40

BRIEF DESCRIPTION OF DUTIES: OWNER, OFFER FINANCIAL SERVICES

2. NAME OF OTHER BUSINESS: FIXED INSURANCE WITH VARIOUS COMPANIES

INVESTMENT RELATED: YES

ADDRESS: SAME AS REGISTERED LOCATION

NATURE OF BUSINESS: FIXED INSURANCE

START DATE: 12/2009

APX NUMBER OF HOURS PER WEEK: VARIES

APX NUMBER OF HOURS DURING TRADING HOURS: VARIES

POSITION/TITLE/RELATIONSHIP: INSURANCE AGENT

BRIEF DESCRIPTION OF DUTIES: SELLS LIFE, HEALTH, DISABILITY, ANNUITIES AND LONG TERM CARE

3. NAME OF OTHER BUSINESS: IGNITE PLANNERS, LLC INVESTMENT RELATED: YES ADDRESS: SAME AS REGISTERED LOCATION NATURE OF BUSINESS: ADVISORY BUSINESS POSITION/TITLE/RELATIONSHIP: PARTNER START DATE: 11/2017 APX NUMBER OF HOURS PER WEEK: VARIES, APX NUMBER OF HOURS DURING TRADING HOURS: VARIES, BRIEF DESCRIPTION OF DUTIES: ASSIST IN RUNNING RIA.

4. JETT AND JENA SCHUSTER

4 TURNBERRY DR, COTO DE CAZA, CA 92679

NATURE OF BUSINESS: COMMERCIAL BUILDING THAT RENTS TO MY S CORP-NO OTHER TENANTS IN THE SPACE.

INVESTMENT RELATED: NO

BUSINESS POSITION, TITLE OR ASSOCIATION: PROPERTY OWNER

BUSINESS DUTIES: PROPERTY OWNER

BUSINESS START DATE: 05/20/2020

APPROXIMATELY TWO HOURS PER MONTH ON THIS OBA WITH ZERO DURING MARKET HOURS.

5. NAME OF OTHER BUSINESS: N/A - RENTAL PROPERTY

INVESTMENT RELATED: NO

ADDRESS: 73012 SKYWARD WAY, PALM DESERT, CA

NATURE OF BUSINESS: HOME WAS PURCHASED TO USE AS A VACATION RENTAL HOME PRIMARILY THROUGH AIR BNB AND ZILLOW TO TENANTS FOR SHORT AND LONG TERM RENTAL PERIODS

TITLE, POSITION, RELATIONSHIP TO OBA: OWNED THROUGH JETT AND JENA SCHUSTER FAMILY TRUST

BUSINESS START DATE: APRIL 2020

HOURS/MONTH DEVOTED TO OBA: 5 HOURS

HOURS DEVOTED TO OBA DURING TRADING: 0 HOURS

BRIEF DESCRIPTION OF DUTIES: N/A

6. NAME OF OTHER BUSINESS: N/A - RENTAL PROPERTY - Knoxville TN

Nature of Business: rental house where our son goes to college

Investment Related: No

Business Position: owner

Business Duties: owner

Business Start Date: 05/01/2023



Registration & Employment History



OTHER BUSINESS ACTIVITIES

Approximately 5 hours spent on this OBA monthly, with 0 during market hours.

7. TN rental apartments - 1509 Highland Ave Unit B105 and Unit A103

Nature of Business: collect rent, student housing for college students.

Investment Related: No

Business Position: owner

Business Duties: owner of the units, no day-to-day duties

Business Start Date: 02/20/2024

Approximately two hours spent on this OBA monthly, with zero during market hours.



Disclosure Summary

Disclosure Information

What you should know about reported disclosure events:

(1) Certain thresholds must be met before an event is reported to IARD, for example:

- A law enforcement agency must file formal charges before an Investment Adviser Representative is required to report a particular criminal event.;
- A customer dispute must involve allegations that an Investment Adviser Representative engaged in activity that violates certain rules or conduct governing the industry and that the activity resulted in damages of at least \$5,000.

(2) Disclosure events in IAPD reports come from different sources:

As mentioned in the "About IAPD" section on page 1 of this report, information contained in IAPD comes from Investment Adviser Representatives, firms and regulators. When more than one of these sources reports information for the same disclosure event, all versions of the event will appear in the IAPD report. The different versions will be separated by a solid line with the reporting source labeled.

(3) There are different statuses and dispositions for disclosure events:

- A disclosure event may have a status of *pending*, *on appeal*, or *final*.
 - A "pending" disclosure event involves allegations that have not been proven or formally adjudicated.
 - A disclosure event that is "on appeal" involves allegations that have been adjudicated but are currently being appealed.
 - A "final" disclosure event has been concluded and its resolution is not subject to change.
- A final disclosure event generally has a disposition of *adjudicated*, *settled* or *otherwise resolved*.
 - An "adjudicated" matter includes a disposition by (1) a court of law in a criminal or civil matter, or (2) an administrative panel in an action brought by a regulator that is contested by the party charged with some alleged wrongdoing.
 - A "settled" matter generally represents a disposition wherein the parties involved in a dispute reach an agreement to resolve the matter. Please note that Investment Adviser Representatives and firms may choose to settle customer disputes or regulatory matters for business or other reasons.
 - A "resolved" matter usually includes a disposition wherein no payment is made to the customer or there is no finding of wrongdoing on the part of the Investment Adviser Representative. Such matters generally involve customer disputes.

(4) You may wish to contact the Investment Adviser Representatives to obtain further information regarding any of the disclosure events contained in this IAPD report.



DISCLOSURE EVENT DETAILS

When evaluating this information, please keep in mind that some items may involve pending actions or allegations that may be contested and have not been resolved or proven. The event may, in the end, be withdrawn, dismissed, resolved in favor of the Investment Adviser Representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

This report provides the information exactly as it was reported to the Investment Adviser Registration Depository. Some of the specific data fields contained in the report may be blank if the information was not provided.

The following types of events are disclosed about this representative:

Type	Count
Customer Dispute	1

Customer Dispute

This section provides information regarding a customer dispute that was reported to the Investment Adviser Registration Depository (IARD) by the Investment Adviser Representative (IAR), an investment adviser and/or securities firm, and/or a securities regulator. The event may include a consumer-initiated, investment-related complaint, arbitration proceeding or civil suit that contains allegations of sales practice violations against the individual.

The customer dispute may be pending or may have resulted in a civil judgment, arbitration award, monetary settlement, closure without action, withdrawal, dismissal, denial, or other outcome.

Disclosure 1 of 1

Reporting Source:	Individual
Employing firm when activities occurred which led to the complaint:	GIRARD SECURITIES, INC.
Allegations:	CUSTOMER ALLEGES THAT RECOMMENDATION OF STRUCTURE NOTES WERE UNSUITABLE AND THAT ACTIVITY IN THE CUSTOMERS' IRA WAS UNAUTHORIZED.
Product Type:	Other: STRUCTURED NOTES
Alleged Damages:	\$47,000.00
Alleged Damages Amount Explanation (if amount not exact):	CUSTOMER ALLEGES APPROXIMATE LOSSES OF ALMOST \$47,000.
Is this an oral complaint?	No
Is this a written complaint?	Yes
Is this an arbitration/CFTC reparation or civil litigation?	No

Customer Complaint Information

Date Complaint Received:	08/28/2012
Complaint Pending?	No
Status:	Settled
Status Date:	11/02/2012



Settlement Amount: \$4,500.00

Individual Contribution Amount: \$4,500.00

Broker Statement BROKER STATES THE CLIENTS UNDERSTOOD AND APPROVED OF THE INVESTMENTS, ACCOUNT DOCUMENTATION SUPPORTS CLIENT PRODUCT UNDERSTANDING AND ACCEPTANCE. BROKER AGREED TO SETTLEMENT WITHOUT ADMITTING FAULT.



End of Report

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