



IAPD Report

LEVI GLENN MCMELLIAN

CRD# 4516443

<u>Section Title</u>	<u>Page(s)</u>
Report Summary	1
Qualifications	2 - 5
Registration and Employment History	6 - 7
Disclosure Information	8



When communicating online or investing with any professional, make sure you know who you're dealing with. [Imposters](#) might link to sites like BrokerCheck from [phishing](#) or similar scam websites, or through [social media](#), trying to steal your personal information or your money.

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

LEVI GLENN MCMELLIAN (CRD# 4516443)

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 **12/17/2025**.

CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
B	AUSDAL FINANCIAL PARTNERS, INC.	CRD# 7995	09/14/2012
IA	CFO4LIFE	CRD# 287600	03/21/2017

QUALIFICATIONS

This representative is currently registered in **1** SRO(s) and **32** 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	AUSDAL FINANCIAL PARTNERS, INC.	7995	RICHARDSON, TX	12/21/2012 - 02/23/2018
IA	CFO4LIFE, L.P.	146904	COPPELL, TX	03/18/2009 - 03/21/2017
IA	LPL FINANCIAL LLC	6413	COPPELL, TX	01/12/2007 - 09/26/2012

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 **32** jurisdiction(s) and 1 SRO(s) through his or her employer(s).

Employment 1 of 2

Firm Name: **AUSDAL FINANCIAL PARTNERS, INC.**

Main Address: 5187 UTICA RIDGE RD
DAVENPORT, IA 52807

Firm ID#: 7995

	Regulator	Registration	Status	Date
	FINRA	General Securities Representative	Approved	09/14/2012
	Alabama	Agent	Approved	03/07/2022
	Arizona	Agent	Approved	09/14/2012
	Arkansas	Agent	Approved	09/14/2012
	California	Agent	Approved	09/14/2012
	Colorado	Agent	Approved	09/14/2012
	Delaware	Agent	Approved	11/28/2023
	Florida	Agent	Approved	09/14/2012
	Georgia	Agent	Approved	09/14/2012
	Idaho	Agent	Approved	10/07/2021
	Illinois	Agent	Approved	07/01/2025
	Indiana	Agent	Approved	05/14/2014
	Iowa	Agent	Approved	01/05/2021



Qualifications

	Regulator	Registration	Status	Date
B	Louisiana	Agent	Approved	10/10/2014
B	Massachusetts	Agent	Approved	08/30/2021
B	Minnesota	Agent	Approved	08/20/2014
B	Mississippi	Agent	Approved	01/25/2019
B	Missouri	Agent	Approved	12/22/2017
B	Montana	Agent	Approved	12/20/2016
B	Nebraska	Agent	Approved	10/28/2013
B	Nevada	Agent	Approved	09/14/2012
B	New Jersey	Agent	Approved	09/14/2012
B	New York	Agent	Approved	08/16/2018
B	North Carolina	Agent	Approved	09/26/2012
B	Ohio	Agent	Approved	09/17/2012
B	Oklahoma	Agent	Approved	09/14/2012
B	Oregon	Agent	Approved	09/14/2012
B	Pennsylvania	Agent	Approved	11/17/2017
B	South Carolina	Agent	Approved	01/28/2025
B	Tennessee	Agent	Approved	09/14/2012
B	Texas	Agent	Approved	09/14/2012
B	Virginia	Agent	Approved	05/10/2017



Qualifications

Regulator	Registration	Status	Date
B Washington	Agent	Approved	09/18/2018

Branch Office Locations

AUSDAL FINANCIAL PARTNERS, INC.

735 PLAZA BLVD #100
COPPELL, TX 75019

AUSDAL FINANCIAL PARTNERS, INC.

5320 Pleasant Run Road
Colleyville, TX 76034

Employment 2 of 2

Firm Name: **CFO4LIFE**
Main Address: 735 PLAZA BLVD.
SUITE 100
COPPELL, TX 75019
Firm ID#: 287600

Regulator	Registration	Status	Date
IA Texas	Investment Adviser Representative	Approved	03/21/2017

Branch Office Locations

CFO4LIFE

735 Plaza Blvd.
Suite 100
Coppell, TX 75019



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
B Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
B General Securities Representative Examination (S7)	Series 7	10/28/2002

State Securities Law Exams

Exam	Category	Date
IA Uniform Investment Adviser Law Examination (S65)	Series 65	01/11/2007
B Uniform Securities Agent State Law Examination (S63)	Series 63	08/11/2003



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	12/21/2012 - 02/23/2018	AUSDAL FINANCIAL PARTNERS, INC.	CRD# 7995	RICHARDSON, TX
IA	03/18/2009 - 03/21/2017	CFO4LIFE, L.P.	CRD# 146904	COPPELL, TX
IA	01/12/2007 - 09/26/2012	LPL FINANCIAL LLC	CRD# 6413	COPPELL, TX
B	10/29/2002 - 09/26/2012	LPL FINANCIAL LLC	CRD# 6413	COPPELL, TX

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
03/2017 - Present	CFO4Life Group, LLC	CEO	Y	Coppell, TX, United States
09/2012 - Present	AUSDAL FINANCIAL PARTNERS	REGISTERED REP	Y	DAVENPORT, IA, United States
01/2007 - 03/2017	CFO4LIFE, INC.	CEO/PARTNER	Y	COPPELL, TX, 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.) MGMT4Life, LLC; Coppell, Texas. Approximately 160 hours per month. Owner. Non-investment related services. Activity began 2/1/2017. MGMT4Life, LLC has entered into an agreement with the Registrant to provide persons, such as Levi McMellian, to serve as officers of the Registrant and to be responsible for the management, supervision and oversight of the Registrant.
- 2.) INDEPENDENT INSURANCE AGENT; TX; INSURANCE SALES; AGENT; APPROX 5-10 HOURS PER MONTH, ALL DURING TRADING HOURS; INVESTMENT RELATED; AGENT - LICENSED AGENT, APPOINTED WITH VARIOUS LIFE, HEALTH, AND DISABILITY INSURANCE COMPANIES. RECOMMEND INSURANCE PRODUCTS TO CLIENTS DEPENDING ON THEIR INDIVIDUAL NEEDS; COMPENSATION BY COMMISSION.
- 3.) LMBC II, L.L.C. D/B/A CFO4LIFE II, L.L.C. 735 PLAZA BLVD., SUITE 100 COPPELL, TX; INSURANCE SALES, Tax preparation, business consulting; APPX. 80 ARE hours DEVOTED TO THIS BUSINESS EACH MONTH OF WHICH 50 ARE DURING TRADING HOURS. NOT INVESTMENT RELATED; GENERAL LINES AGENCY INCLUDING EQUITY INDEXED ANNUITIES; COMPENSATION IS COMMISSION. THIS ORGANIZATION IS NOT A CLIENT OF THE FIRM. Also, through this entity provide Tax Preparation services, business consulting and agency for various insurance companies and loan facilitations. Also, provides educational services to qualified plan participants and other employees.
- 4.) LKCBSS, LLC; INVESTMENT RELATED; FLOWER MOUND, TX; REAL ESTATE; OWNER; ACTIVITY BEGAN 07/2015; I DEVOTE APPX 1 HOUR PER MONTH TO THIS ACTIVITY DURING TRADING HOURS; MAINTENANCE OF PROPERTY.
- 5.) MC4, LLC; NOT INVESTMENT RELATED; COPPELL, TX; FITNESS CENTER; OWNER; ACTIVITY BEGAN 10/2019; I



Registration & Employment History



OTHER BUSINESS ACTIVITIES

DEVOTE APPX 1 HOUR PER MONTH TO THIS ACTIVITY DURING TRADING HOURS; OWNER OF FITNESS CENTER.
6.) MX2 FITNESS, LLC; NOT INVESTMENT RELATED; COPPELL, TX; FITNESS STUDIO; MEMBER; ACTIVITY BEGAN 10/2019; I DEVOTE APPX 1 HOUR DURING TRADING HOURS TO THIS ACTIVITY; OWNER OF ANYTIME FITNESS FACILITY.

7.) SEWELL USELTON INSURANCE AGENCY. NOCONA, TX. AGENT. START DATE 4-2021. SPENDS APPROXIMATELY 5% OF TIME ON INSURANCE ACTIVITIES.

8.) Protect4LIFE, LLC; investment-related. Coppell, TX 75019. The nature of the business is insurance sales. Position: Owner. Start date: 08/2022. Approximate number of hours/month devoted to other business: 10 hrs. Duties: Selling life insurance.

9.) CABO NATION, LLC; NON-INVESTMENT RELATED; CABO SAN LUCAS, MEXICO; REAL ESTATE/RENTAL; OWNER; ACTIVITY BEGAN JUNE 2023; I DEVOTE APPX 2 HOURS PER MONTH TO THIS ACTIVITY ALL DURING TRADING HOURS; OWNER/RENTER OF HOME.

10.) MC4LIFE, LLC; NON-INVESTMENT RELATED; COPPELL, TX; RENTAL PROPERTIES; MEMBER; ACTIVITY BEGAN JULY 2023; I DEVOTE ONE HOUR TO THIS ACTIVITY ALL DURING TRADING HOURS; RENT COLLECTION AND MAINTENANCE.

11.) BLK2023 INVESTMENTS LLC; INVESTMENT RELATED; COPPELL, TX; REAL ESTATE INVESTMENTS; MEMBER; ACTIVITY BEGAN AUGUST 2023; I DEVOTE ONE HOUR TO THIS ACTIVITY ALL DURING TRADING HOURS; RENT & MAINTENANCE.

12.) CHASMC; LLC; INVESTMENT RELATED; COPPELL, TX; LAKE PROPERTY; MANAGER; ACTIVITY BEGAN 02/2024; I DEVOTE APPX 1 HOUR PER MONTH TO THIS ACTIVITY WITH 1 HOUR DURING TRADING HOURS; MANAGE PERSONAL PROPERTY.

13.) RED RIVER NATION, LLC; INVESTMENT RELATED; RED RIVER, NM; REAL ESTATE DEVELOPMENT&RENTAL PROPERTY; BEGAN JULY 2024; MANAGER/MEMBER; I DEVOTE 1 HOUR TO THIS ACTIVITY DURING TRADING HOURS; MANAGE FUTURE RENTALS.

14.) CABO NATION DIAMANTE,LLC; INVESTMENT RELATED; COPPELL, TX;RE RENTAL; MANAGING MEMBER; BEGAN 09/24; I DEVOTE 1 HOUR PER MONTH TO THIS ACTIVITY DURING TRADING HOURS;RENT COLLECTION & MAINTENANCE

15.) MC4LIFE, LLC; NOT INVESTMENT RELATED; DALLAS TEXAS; INVESTMENT REAL ESTATE (OWNS 25%)



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:	Ausdal Financial Partners, Inc.
Allegations:	Client alleges that a VA product was not suitable and that the surrender charges were not disclosed to him at the time of the recommendation. Product was purchased in November 2013.
Product Type:	Annuity-Variable
Alleged Damages:	\$0.00
Alleged Damages Amount Explanation (if amount not exact):	Client did not allege a dollar amount of loss. However, if the client surrendered the VAs he and his wife would incur charges of around \$28,000 as of the date of the complaint.
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:	06/28/2017
Complaint Pending?	No
Status:	Denied
Status Date:	07/26/2017



Settlement Amount:

**Individual Contribution
Amount:**

Broker Statement

Advisor believes the allegations to be erroneous and without merit.



End of Report

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