



IAPD Report

JEFFREY KENNETH BOLL

CRD# 6175714

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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

JEFFREY KENNETH BOLL (CRD# 6175714)

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 **12/06/2024**.

CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
B	LPL FINANCIAL LLC	CRD# 6413	11/04/2024
IA	GLOBAL RETIREMENT PARTNERS LLC	CRD# 172011	11/05/2024

QUALIFICATIONS

This representative is currently registered in **1** SRO(s) and **3** 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	MWA FINANCIAL SERVICES, INC.	112630	Prairie Du Sac, WI	01/25/2018 - 11/07/2024
B	MWA FINANCIAL SERVICES INC.	112630	Prairie Du Sac, WI	04/24/2013 - 11/07/2024

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?

No



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

Employment 1 of 2

Firm Name: **GLOBAL RETIREMENT PARTNERS LLC**
Main Address: 4340 REDWOOD HIGHWAY
SUITE B-60
SAN RAFAEL, CA 94903
Firm ID#: 172011

	Regulator	Registration	Status	Date
IA	Wisconsin	Investment Adviser Representative	Approved	11/05/2024

Branch Office Locations

GLOBAL RETIREMENT PARTNERS LLC
1420 North Ridge Drive
Prairie du Sac, WI 53578

Employment 2 of 2

Firm Name: **LPL FINANCIAL LLC**
Main Address: 1055 LPL WAY
FORT MILL, SC 29715
Firm ID#: 6413

	Regulator	Registration	Status	Date
B	FINRA	General Securities Representative	Approved	11/04/2024
B	FINRA	Invest. Co and Variable Contracts	Approved	11/04/2024
B	FINRA	Investment Co./Variable Contracts Prin	Approved	11/04/2024
B	Illinois	Agent	Approved	11/04/2024
B	Minnesota	Agent	Approved	11/04/2024
B	Wisconsin	Agent	Approved	11/04/2024



Qualifications

Branch Office Locations

LPL FINANCIAL LLC

2501 PARMENTER STREET STE 200
MIDDLETON, WI 53562



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 1 principal/supervisory exam, 3 general industry/product exams, and 2 state securities law exams.

Principal/Supervisory Exams

Exam	Category	Date
B Investment Company Products/Variable Contracts Principal Examination (S26)	Series 26	03/24/2014

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	03/06/2017
B Investment Company Products/Variable Contracts Representative Examination (S6)	Series 6	04/23/2013

State Securities Law Exams

Exam	Category	Date
IA Uniform Investment Adviser Law Examination (S65)	Series 65	10/16/2017
B Uniform Securities Agent State Law Examination (S63)	Series 63	05/07/2013



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	01/25/2018 - 11/07/2024	MWA FINANCIAL SERVICES, INC.	CRD# 112630	Prairie Du Sac, WI
B	04/24/2013 - 11/07/2024	MWA FINANCIAL SERVICES INC.	CRD# 112630	Prairie Du Sac, WI

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
11/2024 - Present	Global Retirement Partners, LLC	Investment Advisor Representative	Y	San Rafael, CA, United States
11/2024 - Present	LPL Financial LLC	Registered Representative	Y	MIDDLETON, WI, United States
03/2013 - Present	MODERN WOODMEN OF AMERICA	INSURANCE SALES	Y	ROCK ISLAND, IL, United States
06/2017 - 11/2024	Schwarz Insurance	Agent	Y	Prairie du Sac, WI, United States
03/2013 - 11/2024	MWA FINANCIAL SERVICES INC	REGISTERED REPRESENTATIVE	Y	ROCK ISLAND, IL, 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) 10/2024 - Modern Woodmen of America / Non-Variable Insurance Trails Only / Inv. Related / Rock Island, IL 61201 / Start date 02/01/2012 -1 Hrs per month -1% Time Spent
- 2) 10/2024 - ASSURED PARTNERS FINANCIAL ADVISORS / DBA for LPL Business (entity for LPL business) / Inv. related / MIDDLETON, WI 53562 / Start date 11/04/2024
- 3) 10/2024 -VILLAGE TRUSTEE OF SAUK CITY / Politics/Government / Non Inv. Related / Sauk City, WI 53583 / Start date 04/01/2018 - 2 Hrs per month -1 % Time Spent
- 4) 11/08/2024 - GLOBAL RETIREMENT PARTNERS - Registered Investment Advisor Hybrid - Advisor - Investment Related - At Reported Business Location(s) - Start Date 11/4/2024 - 160 Hours Per Month/ 8 Hours During Trading - I provide investment advisory services through GLOBAL RETIREMENT PARTNERS, an independent investment advisor firm. I started this business activity in 11/2024. I expect to spend approximately 160 hours per month on this activity. Please see the advisory firm's Form ADV for more information about its address, the nature of its business, its owners, and its services at <http://www.adviserinfo.sec.gov/IAPD>. The firm is separate from and independent of LPL Financial.
- 5) 11/08/2024 - ASSURED PARTNERS FINANCIAL ADVISORS - Registered Investment Advisor DBA - Advisor - Investment Related - At Reported Business Location(s) - Start Date 11/4/2024 - 160 Hours Per Month/ 8 Hours During Trading



End of Report

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