



COLLABORATIVE
FINANCIAL PARTNERS

Form ADV Part 2B – Brochure Supplement

for

**Christopher B. Lightfoot, AAMS[®], CKA[®]
Financial Advisor**

Effective: March 29, 2021

This Form ADV 2B (“Brochure Supplement”) provides information about the background and qualifications of Christopher B. Lightfoot (CRD# 6301146) in addition to the information contained in the Collaborative Financial Partners LLC (“Collaborative Financial” or the “Advisor”, CRD# 289444) Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the content of the Collaborative Financial Disclosure Brochure or this Brochure Supplement, please contact the Advisor at (614) 799-2900.

Additional information about Mr. Lightfoot is available on the SEC’s Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 6301146.

Collaborative Financial Partners LLC
2875 West Dublin Granville Road, Columbus, OH 43235
Phone: (614) 799-2900 * Fax: (614) 766-5691

Item 2 – Educational Background and Business Experience

Christopher B. Lightfoot, born in 1985, is dedicated to advising Clients of Collaborative Financial as a Financial Advisor. Mr. Lightfoot earned a Masters of Business Administration from University of Colorado in 2014. Mr. Lightfoot also earned a Bachelor of Arts from Faith Baptist Bible College in 2008. Additional information regarding Mr. Lightfoot's employment history is included below.

Employment History:

Financial Advisor, Collaborative Financial Partners LLC	10/2018 to Present
Director of Giver Services, National Christian Foundation	10/2018 to Present
Financial Advisor, Edward Jones	01/2017 to 09/2018
Life Consultant, Protective Distributors	06/2013 to 12/2016

Accredited Asset Management Specialist™ (“AAMS®”)

Individuals who hold the AAMS® designation have completed a course of study encompassing investments, insurance, tax, retirement, and estate planning issues. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

Certified Kingdom Advisor (“CKA®”)

Kingdom Advisors is a non-profit training organization for financial professionals who specialize in the planning differentiators that exist when you apply a Christian worldview to financial decision-making.

The prerequisites for the designation/certification are that the advisor must hold one of the approved industry designations (CFP®, ChFC®, CPA, CPA/PFS, EA, CFA, CIMA®, AAMS®, CLU®, JD) or 10 years of experience in the discipline in which applying for the CKA® designation. The disciplines include financial planning, investments, accounting, estate planning law, and insurance. The education prerequisites for the designation/certification is a 21.5-hour online course and a 200-question open-book exam with a minimum score of 80%. In January 2017, the educational prerequisite will move to a 3-credit hour equivalent certificate course offered by the two largest Christian universities in the US. The new university-based course will be offered in cohorts consisting of approximately 50 hours of student work over 8 weeks and a new proctored exam administered once a student completes the university-based CKA® Educational Program. All candidates must sign a "Statement of Faith," obtain a letter of reference from pastor or member of pastoral staff, pass a regulatory review, complete a signed statement of personal stewardship and submit two client references.

The continuing education requirement to maintain the designation is 10 hours annually. Kingdom Advisors (“KA”) also requires all CKA® designees to remain in substantial compliance with a set of ethical principles, rules, and standards in order to use or to continue to use the CKA® designation. In order to oversee such compliance, KA has established procedures for reporting ethical violation, as well as a set of disciplinary procedures to oversee the investigation of potential violations of such principles.

Item 3 – Disciplinary Information

There are no legal, civil or disciplinary events to disclose regarding Mr. Lightfoot. Mr. Lightfoot has never been involved in any regulatory, civil or criminal action. There have been no client complaints, lawsuits, arbitration claims or administrative proceedings against Mr. Lightfoot.

Securities laws require an advisor to disclose any instances where the advisor or its advisory persons have been found liable in a legal, regulatory, civil or arbitration matter that alleges violation of securities and other statutes; fraud; false statements or omissions; theft, embezzlement or wrongful taking of property; bribery, forgery, counterfeiting, or extortion; and/or dishonest, unfair or unethical practices. **As previously noted, there are no legal, civil or disciplinary events to disclose regarding Mr. Lightfoot.**

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However, the Advisor encourages Clients to independently view the background of Mr. Lightfoot on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD# 6301146.

Item 4 – Other Business Activities

Insurance Agency Affiliations

Christopher B. Lightfoot is also a licensed insurance professional conducting the majority of his business through Collaborative Insurance Partners (“Collaborative Insurance”). Implementations of insurance recommendations are separate and apart from Mr. Lightfoot’s advisory role with Collaborative Financial. Mr. Lightfoot will receive customary commissions and other related revenues from the various insurance companies whose products are sold, either directly as a licensed insurance professional or through Collaborative Insurance. Mr. Lightfoot is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This practice presents a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Mr. Lightfoot, Collaborative Insurance or the Advisor.

National Christian Foundation

Mr. Lightfoot is the Director of Giver Services for the National Christian Foundation (NCF) in Columbus, Ohio. In this role, Mr. Lightfoot oversees the day-to-day processing of gift and grant transactions. He also coordinates team meetings, outreach events and local marketing and communication initiatives. He spends approximately 60% of the week in this capacity. Mr. Lightfoot is compensated by the NCF.

Cornerstone Academy

Mr. Lightfoot is a board member for the Cornerstone Academy, a charter school in Westerville, Ohio. In this capacity, he attends monthly board meetings and receives no compensation.

Columbus Humanities Arts & Technology Academy

Mr. Lightfoot is a board member of the Columbus Humanities Arts and Technology Academy, a charter school in Columbus, Ohio. In this capacity, he attends monthly board meetings and receives no compensation.

Design Outreach

Mr. Lightfoot is a board member of Design Outreach in New Albany, Ohio. Design Outreach is a nonprofit humanitarian organization. In his role as a board member, Mr. Lightfoot provides vision casting and oversight of the organization. He spends approximately 8 hours per month in this capacity and receives no compensation.

Item 5 – Additional Compensation

Mr. Lightfoot has additional business activities where compensation is received that are detailed in Item 4 above.

Item 6 – Supervision

Mr. Lightfoot serves as a Financial Advisor of Collaborative Financial and is supervised by Christopher Johnson, the Chief Compliance Officer. Mr. Johnson can be reached at (614) 799-2900.

Collaborative Financial has implemented a Code of Ethics, an internal compliance that guides each Supervised Person in meeting their fiduciary obligations to Clients of Collaborative Financial. Further, Collaborative Financial is subject to regulatory oversight by various agencies. These agencies require registration by Collaborative Financial and its Supervised Persons. As a registered entity, Collaborative Financial is subject to examinations by regulators, which may be announced or unannounced. Collaborative Financial is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Advisor.