

LEVI WESTRA

FINANCIAL PLAN, INC.

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This Brochure Supplement provides information about Levi Westra that supplements the Financial Plan, Inc. Firm Brochure (Form ADV Part 2A). You should have received a copy of that Brochure. Please contact David Dick at (360) 714-1234 or david.dick@financialplaninc.com if you did not receive copy of Financial Plan, Inc.'s Form ADV Part 2A or if you have any questions about the contents of this Brochure Supplement.

Additional information about Levi Westra (CRD# 8225893) is available on the SEC's website at www.adviserinfo.sec.gov.

LEVI BRIAN WESTRA
Year of Birth: 2003

Item 2 – Educational Background and Business Experience

EDUCATION

2025, BSA Accounting, BSA Finance, Minor Supply Chain Management, Calvin University

BUSINESS BACKGROUND

02/2026 to Present	Investment Advisor Representative
01/2026 to 02/2026	Apprentice Advisor Financial Plan, Inc. (Bellingham, WA)
05/2025 to 09/2025	Accounting Intern Hollander Hospitality (Bellingham, WA)
06/2022 to 08/2023	Accounting Associate Lynden Door (Lynden, WA)

Item 3 – Disciplinary Information

Levi Westra has never been subject to any legal or disciplinary proceedings which would be considered material (or otherwise) to a Client's evaluation of him or any of the services Financial Plan, Inc. provides.

Item 4 – Other Business Activities

None.

Item 5 – Additional Compensation

Levi Westra does not receive additional compensation or economic benefit from third parties for providing advisory services to clients of Financial Plan, Inc.

Item 6 - Supervision

David Dick is responsible for supervising the services and advice provided to clients of Financial Plan, Inc., and can be reached at (360) 714-1234. As Chief Compliance Officer, he develops policies and procedures for adherence to the Investment Advisers' Act. Levi Westra works under David Dick's supervision.