

**Kimberly Hoffmann**

**Innovative Wealth Management, LLC**

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**March 16, 2021**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Kimberly Hoffmann that supplements the Innovative Wealth Management, LLC brochure. You should have received a copy of that brochure. Contact us at 319-449-6900 if you did not receive Innovative Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Kimberly Hoffmann (CRD# 6357368) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### Kimberly Hoffmann

*Year of Birth:* 1994

*Formal Education After High School:*

- University of Northern Iowa, BA Finance with emphasis in Management, 5/2015

*Business Background:*

- Innovative Wealth Management, LLC, Investment Adviser Representative, 8/2019- Present
- Innovative Wealth Management, LLC, Administrative Assistant, 8/2017 - Present

## Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mrs. Kimberly Hoffmann has no required disclosures under this item.

## Item 4 Other Business Activities

Kimberly Hoffmann is separately licensed as an independent insurance agent. In this capacity, she can effect transactions in insurance products for her clients and earn commissions for these activities. The fees you pay our firm for advisory services are separate and distinct from the commissions earned by Mrs. Hoffmann for insurance-related activities. This presents a conflict of interest because Mrs. Hoffmann may have an incentive to recommend insurance products to you for the purpose of generating commissions rather than solely based on your needs. However, you are under no obligation, contractually or otherwise, to purchase insurance products through any person affiliated with our firm.

Ms. Hoffmann is also Owner/ Director of Innovative Tax Services, LLC, an entity which is a for-profit tax planning, tax consulting and tax preparation business. Ms. Hoffmann's duties as the Owner/Director of Innovative Tax Services, LLC do not create a conflict of interest to her provision of advisory services through Innovative Wealth Management, LLC. Ms. Hoffmann is also a Managing Member of Innovative Consultants, LLC, a public accounting firm. Ms. Hoffmann's duties as a Managing Member of Innovative Consultants, LLC do not create a conflict of interest to her provision of advisory services through Innovative Wealth Management, LLC.

## Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mrs. Hoffmann's receipt of additional compensation as a result of her other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Innovative Wealth Management, LLC's firm brochure for additional disclosures on this topic.

## Item 6 Supervision

As the Managing Member/ Chief Compliance Officer of Innovative Wealth Management, LLC, Zachary Knutson supervises the advisory activities of our firm. Zachary Knutson can be reached at 319-449-

6900.

## **Item 7 Requirements for State Registered Advisers**

Kimberly Hoffmann does not have any reportable arbitration claims, has not been found liable in a reportable civil, self-regulatory organization or administrative proceeding, and has not been the subject of a bankruptcy petition.