

**Item 1: Cover Page  
Part 2B of Form ADV: Brochure Supplement  
March 2021**

**Steven Charles Wilbourn**



**2270 Jolly Oak Rd., Suite 2  
Okemos, MI 48864  
[www.fsgmichigan.com](http://www.fsgmichigan.com)**

This brochure supplement provides information about Mr. Wilbourn that supplements our brochure. You should have received a copy of that brochure. Please contact Chief Compliance Officer, Kristin Prieur, if you did not receive Financial Strategies Group, Inc's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Wilbourn is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) by searching CRD # 5947902.

## Item 2: Educational Background & Business Experience

**Steven C. Wilbourn**

**Year of Birth:** 1969

**Educational Background:**

- 1993 – 1994: Attended Washtenaw Community College; No Degree Obtained

**Business Background:**

- 06/2019 – Present Financial Strategies Group, Inc; Investment Adviser Representative
- 06/2019 – Present FSG Insurance Agency; Agent
- 07/2016 – 06/2019 Royal Alliance (dba Michigan Financial Companies); Registered Representative
- 06/2015 – 06/2016 Transamerica Agency Network; Financial Services Agent
- 04/2011 – 06/2015 Liggett Vector Brands; Account Manager

**Exams, Licenses & Other Professional Designations:**

- 2017: Series 66 Exam
- 2017: Series 7 Exam
- 2018: SIE
- Insurance Licensed

## Item 3: Disciplinary Information

Mr. Wilbourn has no history of any legal or disciplinary events that deem to be material to a client's consideration of Steven Wilbourn to act as their investment adviser representative. FINRA's BrokerCheck® may have additional information regarding the disciplinary history of Mr. Wilbourn that is not included in this brochure supplement.

(<http://brokercheck.finra.org/Support/TermsAndConditions.aspx>)

## Item 4: Other Business Activities

Mr. Wilbourn is a licensed insurance agent. In such capacity, he offers fixed insurance products to clients and receives normal and customary commissions and trails as a result of any purchases of insurance products made by clients. The potential for receipt of commissions and other compensation gives him an incentive to recommend insurance products based on the compensation received, rather than on the client's needs. To address this, disclosure is made to the client at the time purchase is made, identifying the nature of the transaction or relationship, the role to be played and any compensation (e.g., commissions, trails) to be paid by the client and/or received by the insurance agent. He will at all times act in the best interest of his clients and act as a fiduciary in

carrying out services to clients. It should be noted that the client is under no obligation to purchase insurance products through Mr. Wilbourn.

### **Item 5: Additional Compensation**

Mr. Wilbourn has additional business activities where compensation is received as detailed in Item 4 above. This compensation is in addition to the advisory fees.

### **Item 6: Supervision**

Steven Wilbourn is supervised through a compliance program designed to prevent and detect violations of the federal and state securities laws. Supervision is conducted by the Chief Compliance Officer, Kristin Prieur, who is responsible for administering the policies and procedures. Kristin Prieur reviews those policies and procedures annually for their adequacy and the effectiveness of their implementation. All policies and procedures of the firm are followed. Kristin Prieur can be reached at (517) 347-4337.