

## Form ADV Part 2B: Brochure Supplement

### **Item 1 – Cover Page**

Rodney Schauer  
Complete Investment Advisory, LLC  
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Fargo, ND 58103  
701-277-9392

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This brochure supplement provides information about Rodney Schauer that supplements the Complete Investment Advisory, LLC (“Complete Investment Advisory”) disclosure brochure. You should have received a copy of that brochure. Please contact Rodney Schauer at 701-277-9392 or at [rod@completeinvestmentadvisory.com](mailto:rod@completeinvestmentadvisory.com) if you did not receive Complete Investment Advisory, LLC’s brochure or if you have any questions about the contents of this supplement. Additional information about Rodney Schauer is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **Item 2 – Educational Background and Business Experience**

#### **Rodney Schauer**

10/01/1959

#### ***Post Secondary Educational Background:***

- The American College, Chartered Financial Consultant: 2011

#### ***Business Background:***

- Complete Investment Advisory, LLC, Managing Member/Investment Adviser Representative, 03/2013 to Present;
- The Wright Legacy Group, Investment Adviser Representative, 02/2012 to 07/2013;
- Rod Schauer, Independent Insurance Agent, 10/1980 to present (insurance sales continued through Complete Financial Group, Inc. d/b/a Retire Safely, from 06/1992 through 12/2021 and now through Retire Safely, LLC);
- Complete Financial Group, Inc., President and Direct Owner, 06/1992 to Present;
- Retire Safely, LLC, Managing Member and Insurance Agent; 01/2022 to Present; and
- Complete Tax Advisory LLC, Managing Member, 01/2010 to Present.

#### ***Professional Designation***

#### **Chartered Financial Consultant® (ChFC®)**

The Chartered Financial Consultant® (ChFC®) designation is issued by The American College. A candidate for designation must have 3 years of full-time business experience within the 5 years before the designation is awarded. Candidates must complete 6 core and 2 elective courses and pass a proctored final exam for each course. Designates must complete 30 hours of continuing education every 2 years.

### **Item 3 – Disciplinary Information**

I have no legal or disciplinary events to report.

### **Item 4 – Other Business Activities**

#### **Insurance Agent**

I am independently licensed to sell insurance and annuity products through Retire Safely, LLC which an insurance company owned and controlled by our parent company, Complete Financial Group, Inc. When acting in this capacity, I receive commissions for selling insurance and annuity products.

I may also receive other incentive awards for the recommendation/sale of annuities and other insurance products. The receipt of compensation and other incentive benefits may affect my judgment when recommending products to clients. Although I endeavor at all times to put the interest of clients first as a part of Complete Investment Advisory's overall fiduciary duty to clients, clients should be aware that the receipt of commissions and additional compensation itself creates a conflict of interest.

Clients are never obligated or required to purchase insurance products from or through my insurance company and may choose any independent insurance agent and insurance company to purchase insurance products. Regardless of the insurance agent selected, the insurance agent or agency will receive normal commissions from the sale.

#### **Tax Preparation**

I provide tax preparation services through my affiliated company, Complete Tax Advisory, LLC. Clients are under no obligation to utilize my tax services, but if you elect to do so, any fees charged for tax preparation services will be billed separately and are in addition to the advisory fees assessed by Complete Investment Advisory. There are tax preparation services, other than Complete Tax Advisory, available and I have an obvious conflict of interest if I suggest you utilize Complete Tax Advisory over other companies.

### **Item 5 – Additional Compensation**

I receive no additional compensation beyond the typical advisory fees charged to clients and compensation earned through my other business activities described above.

### **Item 6 – Supervision**

I am responsible for overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm. I can be contacted at 701-277-9392.

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

I have not been involved in an arbitration award and have not been found liable in an arbitration claim alleging damages in excess of \$2,500. I have not been involved in any award or found liable in any civil, self-regulatory organization, or administrative proceeding. Additionally, I have not been the subject of a bankruptcy petition.

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