

*This brochure supplement provides information about Andrew Levacy that supplements the Change Path LLC brochure. You should have received a copy of that brochure. Please contact J.P. Rankin at 913-402-2175 if you did not receive Change Path LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Andrew Levacy is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **Change Path LLC**

### **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

### **Andrew Levacy**

Personal CRD Number: 4219193  
Investment Adviser Representative

Located At:  
1330 Orange Ave  
Suite 324  
Coronado, CA 92118  
619.435.1234

Change Path LLC  
11460 Tomahawk Creek Pkwy  
Suite 200  
Leawood, KS 66211  
888.798.2360

UPDATED: 10/26/2020

## Item 2: Educational Background and Business Experience

**Name:** Andrew Levacy                      **Born:** 1980

### **Education:**

Mr. Levacy received a B.S. in Psychology with a Biology Emphasis from the University of California Davis.

### **Business Background:**

10/2020-Present      Investment Adviser Representative  
ChangePath, LLC

01/2013-Present      Owner  
The Levacy Group

07/2009-Present      Registered Representative  
Sorrento Pacific Financial

09/2007-12/2016      Owner  
Levacy Photography

07/2009-10/2020      Investment Adviser Representative  
Partnervest Advisory Services

## Item 3: Disciplinary Information

Andrew Levacy does not have any material disciplinary history.

Additional information about Mr. Levacy may be found on the SEC's Investment Adviser Public Disclosure website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov) or at the FINRA's Broker Check website at [www.brokercheck.finra.org](http://www.brokercheck.finra.org).

## Item 4: Other Business Activities

Andrew Levacy is a licensed insurance agent. From time to time, Mr. Levacy may offer clients advice and/or products from this activity. Clients should be aware that these

services may pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Change Path LLC always acts in the best interest of the client; including in the sale of commissionable products to Advisory clients.

Mr. Levacy is a registered representative of Sorrento Pacific Financial, a securities broker/dealer, member of FINRA and SIPC. The adviser may receive commissions, 12b-1 fees or other compensation for security transactions placed through Sorrento Pacific Financial in addition to advisory fees paid by the client. The receipt of this compensation may create an incentive to make certain investment recommendations which could generate commissions, which is a potential conflict of interest. However, the adviser is obligated to adhere to Sorrento Pacific's Code of Ethics, which requires them to act in their client's best interest.

Clients of Change Path are not obligated in any manner to utilize the aforementioned services provided by Mr. Levacy.

Change Path does not supervise and does not receive any compensation from these Other Outside Business Activities.

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

Andrew Levacy may receive additional compensation in the form of sales awards and/or marketing credits depending on levels of overall sales in connection with services provided to the client. These incentives might constitute a conflict of interest as they could encourage Mr. Levacy to recommend transactions for the purpose of attaining these awards. Clients are under no obligation to engage in any securities or Advisory transactions.

### **Item 6: Supervision**

As an Investment Adviser Representative of Change Path LLC, Andrew Levacy is supervised by J.P. Rankin, the firm's Chief Compliance Officer, and is to adhere to the policies and procedures set forth by Change Path LLC. The phone number for Mr. Rankin is (913) 402-2175.