

**Part 2B of Form ADV**

For

**Longview Financial Advisors, Inc**

**March 23, 2026**

**Item 1- Cover Page**

**Offices: 4245 Balmoral Drive SW, Suite 306, Huntsville, AL 35801**

**Phone: 256-534-1196**

**This Brochure Supplement provides information about Jessica Hovis Smith, Charles “Wesley” Johnson, and Phillip “Andrew” Gipner that supplements the Longview Financial Advisors, Inc. Brochure. You should have received a copy of that Brochure. Please contact our office at 256-534-1196 if you did not receive Longview Financial Advisors, Inc.’s Brochure or if you have any questions about the contents of this supplement.**

**Additional information about Longview Financial Advisors, Inc. is available on the SEC’s website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**JESSICA HOVIS SMITH, CFP<sup>®</sup>, CAP<sup>®</sup>, CLU<sup>®</sup>, CPWA<sup>®</sup>**



**Item 2- Educational Background and Business Experience**

Year of Birth: 1982

*Formal Education After High School:*

- University of Alabama, Bachelor of Science, Consumer Sciences with emphasis on Family Financial Planning and Counseling, 2005
- College For Financial Planning, Certified Mutual Fund Counselor program, 2007

*Designations:*

- CERTIFIED FINANCIAL PLANNER<sup>®</sup> professional, 2006
- Chartered Life Underwriter<sup>®</sup>, 2008
- Chartered Private Wealth Advisor<sup>SM</sup>, 2012
- Chartered Advisor In Philanthropy<sup>®</sup>, 2016
- NAPFA Registered Financial Advisor, National Association of Personal Financial Advisors, 008

*Associations:*

- Member, Investments and Wealth Institute<sup>®</sup>, 2012 to present
- Huntsville Financial and Estate Planning Council Member, 2010 to present

*Business Background:*

- Longview Financial Advisors, Inc., Chief Compliance Officer, 2010 to present
- West Financial Consulting, Inc., 2005 to 2009

**Item 3- Disciplinary Information**

There are no legal or disciplinary events against Jessica.

**Item 4- Other Business Activities**

Jessica is not involved in any business that would create a conflict of interest with her duties at Longview.

**Item 5- Additional Compensation**

Jessica does not receive any special compensation that would deter her from focusing her efforts on the best interest of the client.

**Item 6- Supervision**

Longview provides investment advisory and supervisory services in accordance with the Longview's policies and procedures manual. The primary purpose of Longview's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940. Longview's Chief Compliance Officer, Jessica Smith, is primarily responsible for the implementation of Longview's policies and procedures and overseeing the activities of Longview's supervised persons. Should a client have any questions regarding Longview's supervision or compliance practices, please contact Ms. Smith at 256-534-1196.

**CHARLES WESLEY JOHNSON, CIMA®**



**Item 2- Educational Background and Business Experience**

Year of Birth: 1983

*Formal Education After High School:*

- Jacksonville State University, Bachelor of Science in Economics, 2005
- University of Alabama, Master of Science, Consumer Sciences with emphasis on Family Financial Planning and Counseling, 2006

*Designations:*

- Certified Investment Management Analyst®, 2018

*Associations:*

- Member, Investments and Wealth Institute®, 2017 to present

*Business Background:*

- Longview Financial Advisors, Inc., Analyst, 2010 to present
- Longview Financial Advisors, LLC, Chief Investment Officer, 2008 to 2009

**Item 3- Disciplinary Information**

There are no legal or disciplinary events against Charles Wesley Johnson.

#### **Item 4- Other Business Activities**

Charles is not involved in any business that would create a conflict of interest with his duties at Longview.

#### **Item 5- Additional Compensation**

Charles does not receive any special compensation that would deter him from focusing his efforts on the best interest of the client.

#### **Item 6- Supervision**

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**PHILLIP ANDREW GIPNER, CFP®, M.S.**



**Item 2- Educational Background and Business Experience**

Year of Birth: 1987

*Formal Education After High School:*

- University of Alabama, Bachelor of Science, Education with emphasis in Social Science, 2010
- University of Alabama, Master of Science, Consumer Sciences with emphasis on Family Financial Planning and Counseling, 2011

*Designations:*

- CERTIFIED FINANCIAL PLANNER® professional, 2013
- Accredited Estate Planner®, 2019
- NAPFA Registered Financial Advisor, National Association of Personal Financial Advisors, (NAPFA), 2013

*Associations:*

- National Association of Estate Planning and Councils, 2016 to present

*Business Background:*

- Longview Financial Advisors, Inc., 2011 to present
- First Protective Insurance Group, 2010 to 2011

### **Item 3- Disciplinary Information**

There are no legal or disciplinary events against Andrew.

### **Item 4- Other Business Activities**

Andrew is not involved in any business that would create a conflict of interest with his duties at Longview.

### **Item 5- Additional Compensation**

Andrew does not receive any special compensation that would deter him from focusing his efforts on the best interest of the client.

### **Item 6- Supervision**

Longview provides investment advisory and supervisory services in accordance with the Longview's policies and procedures manual. The primary purpose of Longview's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940. Longview's Chief Compliance Officer, Jessica Smith, is primarily responsible for the implementation of Longview's policies and procedures and overseeing the activities of Longview's supervised persons. Should a client have any questions regarding Longview's supervision or compliance practices, please contact Ms. Smith at 256-534-1196.

## PROFESSIONAL DESIGNATIONS

### MINIMUM QUALIFICATIONS REQUIRED FOR EACH DESIGNATION

#### **CERTIFIED FINANCIAL PLANNER® professional**

Certain representatives are certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, he/she may refer to himself/herself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and he/she may use these and CFP Board’s other certification marks (the “CFP Board Certification Marks”). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.cfp.net](http://www.cfp.net).

CFP® professionals have met CFP Board’s high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor’s degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor’s or higher degree or completed a financial planning development capstone course.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board’s Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **CLU®- Chartered Life Underwriter®**

Issued by: The American College

Prerequisites/Experience Required: Three years of full-time business experience within the five years preceding the awarding of the designation.

Educational Requirements: Five core and three elective courses

Examination Type: Final proctored exam for each course

Continuing Education Requirements: 30 hours of continuing education every two years.

Code of Ethics must be signed and adhered to.

### **CPWA®- Chartered Private Wealth Advisor®**

Issued by: Investments and Wealth Institute®

Prerequisites/Experience Required: Five years of full-time professional client-centered experience in financial services or a related industry

Educational Requirements: Six-month self-study program, followed by five days in class at The University of Chicago Booth School of Business

Examination Type: Final comprehensive exam

Continuing Education Requirements: 40 hours of continuing education every two years

Code of Ethics must be signed and adhered to.

**CAP® - Chartered Advisor In Philanthropy®**

Issued by: The American College

Prerequisites/Experience Required: Three years of full-time business experience within the five years preceding the awarding of the designation.

Educational Requirements: Three master level classes

Examination Type: Final proctored exam for each course.

Code of Ethics must be signed and adhered to.

**CIMA® - Certified Investment Management Analyst®**

Issued by: Investments and Wealth Institute

Prerequisites/Experience Required: Three years of full-time experience in financial services.

Educational Requirements: Complete executive education through either the University of Chicago Booth School of Business, The Wharton School at the University of Pennsylvania, or the Yale School of Management.

Examination Type: Five-hour proctored exam.

Code of Ethics must be signed and adhered to.

**AEP® - Accredited Estate Planner®**

Issued by: National Association of Estate Planners & Councils

Prerequisites/Experience Required: Five years of full-time experience in one of the following: accounting; insurance and financial planning; law; philanthropy; and trust services

Educational Requirements: In addition to having one or more of the following credentials: JD (active law license required if this is the only credential with which you are applying), CPA, CLU®, CFP®, ChFC®, CPWA®, CFA, CAP®, CSPG, CTFA, MSFS, and MST, completion of two master's level classes through the American College.

Code of Ethics must be signed and adhered to.

**NAPFA (National Association of Personal Financial Advisors) Registered Financial Advisor**

Issued by: National Association of Personal Financial Advisors

Prerequisites/Experience Required: Candidate must meet all of the following requirements:

Have at least three years of comprehensive financial planning experience,

Provide investment and/or financial advice on a strictly Fee-Only basis,

Possess the CERTIFIED FINANCIAL PLANNER™ designation awarded by the Certified Financial Planner Board of Standards, Inc.,

Adhere to NAPFA's Fiduciary Oath, Standards of Membership and Affiliation, and Bylaws,

Educational Requirements: Bachelor's Degree

Continuing Education Requirements: 60 hours of continuing education every two years