



BLUESTEM WEALTH PARTNERS, LLC

FORM ADV PART 2B

Brochure Supplement
Professional Backgrounds of Advisory Personnel

Item 1 – Cover Page

October 2025

13100 Wayzata Blvd, Ste 140
Minnetonka, MN 55305
612-464-0372

This brochure supplement provides information about BlueStem Wealth Partners investment advisory personnel. This is a supplement to the BlueStem Wealth Partners Form ADV Part 2A brochure. You should have received a copy of that brochure. Please contact the Firm's Chief Compliance Officer, Andy Warning at (513) 832-5463, if you have not received the brochure or if you have any questions about the contents of this supplement.

Additional information about BlueStem Wealth Partners is available on the SEC's website at www.adviserinfo.sec.gov.

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Each member of BlueStem Wealth Partners professional staff is evaluated on the basis of his or her education and work experience. Prior related business experience, a specialized business or technical skill or applicable undergraduate/post-graduate work are required. In addition, any associated persons involved in determining investment strategy or giving investment advice to clients must meet the examination and licensing requirements of the states in which they provide investment advisory services.

All Firm personnel are supervised by the Firm's Chief Compliance Officer. Supervision is ongoing and includes, account reviews, trade supervision, annual compliance reviews including the testing of Firm systems, staff meetings and employee reviews.

Aaron Seiffert

Financial Advisor

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This brochure supplement provides information about Aaron Seiffert and should be included with BlueStem Wealth Partners' main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Aaron is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD#7477760.

Item 2 – Education Background and Business Experience

Born 1990

Education

High School Graduate: Yes

Level of Post-Secondary Education: Bachelors

Business Background

02/2023 – Present BlueStem Wealth Partners, Financial Advisor

12/2021 – 02/2023 Financial Advisor, Ameriprise Financial Services, LLC

Exams, Licenses & Other Professional Designations

2023 – Series 66

2022- Series 7

Item 3 – Disciplinary Information

Mr. Seiffert has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Mr. Seiffert has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Mr. Seiffert has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Mr. Seiffert is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Crescent Hoffman

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Crescent Hoffman and should be included with BlueStem Wealth Partners' main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Crescent is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD# 5320670.

Item 2 – Education Background and Business Experience

Born 1966

Education

High School Graduate: Yes

Level of Post-Secondary Education: Bachelors

Business Background

02/2023 – Present BlueStem Wealth Partners, Financial Advisor

01/2007 – 02/2023 Licensed Paraplanner, Ameriprise Financial Services, LLC

Exams, Licenses & Other Professional Designations

2009 - Series 66 Exam, Series 7 Exam

2022 - Behavioral Financial Advisor (BFA™)

Item 3 – Disciplinary Information

Ms. Hoffman has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Ms. Hoffman has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Ms. Hoffman has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Ms. Hoffman is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Heather Fears

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Heather Fears and should be included with BlueStem Wealth Partners main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Heather is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD# 4748845.

Item 2 – Education Background and Business Experience

Born 1979

Education

High School Graduate: Yes

Level of Post-Secondary Education: Associates

Business Background

02/2023 – Present BlueStem Wealth Partners, Financial Advisor

10/2021 – 02/2023 Licensed Paraplanner, Ameriprise Financial Services, LLC

Exams, Licenses & Other Professional Designations

2005 – Series 66 Exam, Series 7

2022- Behavioral Financial Advisor (BFA™)

Item 3 – Disciplinary Information

Ms. Fears has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Ms. Fears has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Ms. Fears has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Ms. Fears is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Jason Dreger

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Jason Dreger and should be included with BlueStem Wealth Partners main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners or if you have questions about the contents. Additional information about Jason is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD# 3038968.

Item 2 – Education Background and Business Experience

Born 1970

Education

High School Graduate: Yes

Level of Post-Secondary Education: Bachelors

Business Background

02/2023 – Present BlueStem Wealth Partners, Financial Advisor

04/1999 – 02/2023 Ameriprise Financial Services, Inc., Delano, MN: Financial Advisor

Exams, Licenses & Other Professional Designations

1999 – Series 7

1998 – Series 6 & 63 Exams

-Accredited Portfolio Management Advisor (APMA™)

-Behavioral Financial Advisor (BFA™)

-Chartered Retirement Planning Counselor (CRPC™)

Item 3 – Disciplinary Information

Mr. Dreger has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Mr. Dreger has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Mr. Dreger has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Mr. Dreger is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Jill Lawrence

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Jill Lawrence and should be included with BlueStem Wealth Partners' main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Jill is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD# 2341207.

Item 2 – Education Background and Business Experience

Born 1971

Education

High School Graduate: Yes

Level of Post-Secondary Education: Bachelors

Business Background

02/2023 – Present BlueStem Wealth Partners, Financial Advisor

01/1998 – 02/2023 AFG Advisor, Ameriprise Financial

Exams, Licenses & Other Professional Designations

1997 – Series 63 Exam

1996 – Series 7

-Behavioral Financial Advisor (BFA™)

-Certified Financial Planner™, (CFP®)

-Certification for Long-Term Care (CLTC®)

-Certified Kingdom Advisor® (CKA®)

Item 3 – Disciplinary Information

Ms. Lawrence has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Ms. Lawrence has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Ms. Lawrence has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Ms. Lawrence is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Joel McCann

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Joel McCann and should be included with BlueStem Wealth Partners' main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Joel is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD# 5866775.

Item 2 – Education Background and Business Experience

Born 1975

Education

High School Graduate: Yes

Level of Post-Secondary Education: Bachelors

Business Background

02/2023 – Present BlueStem Wealth Partners, Financial Advisor

11/2010 – 02/2023 Financial Advisor, Ameriprise Financial Services, Inc.

Exams, Licenses & Other Professional Designations

2011 – Series 66 Exam

2010 – Series 7 Exam

-Accredited Portfolio Management Advisor (APMA™)

-Behavioral Financial Advisor (BFA™)

-Chartered Retirement Planning Counselor (CRPC™)

Item 3 – Disciplinary Information

Mr. McCann has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Mr. McCann has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Mr. McCann has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Mr. McCann is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

John Max

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about John Max and should be included with BlueStem Wealth Partners' main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about John is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD# 5027247.

Item 2 – Education Background and Business Experience

Born 1991

Education

High School Graduate: Yes

Level of Post-Secondary Education: Bachelors

Business Background

02/2023 – Present	BlueStem Wealth Partners, Financial Advisor
05/2020 – 02/2023	Financial Advisor, Ameriprise Financial Services, LLC
04/2019 – 05/2020	Licensed Paraplanner, Ameriprise Financial Services, LLC
01/2019 – 04/2019	Associated Person, Ameriprise Financial Services, LLC

Exams, Licenses & Other Professional Designations

2019 – Series 66 Exam, Series 7 Exam

-Accredited Portfolio Management Advisor (APMA™)

-Behavioral Financial Advisor (BFA™)

Item 3 – Disciplinary Information

Mr. Max has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Mr. Max has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Mr. Max has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Mr. Max is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Kevin Max

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Kevin Max and should be included with BlueStem Wealth Partners' main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Kevin is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD# 1436077.

Item 2 – Education Background and Business Experience

Born 1962

Education

High School Graduate: Yes

Level of Post-Secondary Education: Bachelors

Business Background

02/2023 – Present BlueStem Wealth Partners, Financial Advisor

12/1985 – 02/2023 Financial Advisor, Ameriprise Financial Services, Inc.

Exams, Licenses & Other Professional Designations

1985 – Series 63 Exam, Series 7 Exam

-Chartered Financial Consultant (ChFC®)

Item 3 – Disciplinary Information

Mr. Max has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Mr. Max has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Mr. Max has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Mr. Max is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Luke DeBenedetto

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Luke DeBenedetto and should be included with BlueStem Wealth Partners main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Luke is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD#6874549.

Item 2 – Education Background and Business Experience

Born 1995

Education

High School Graduate: Yes

Level of Post-Secondary Education: Bachelors

Business Background

02/2023 – Present BlueStem Wealth Partners, Financial Advisor

10/2019 – 02/2023 Financial Advisor, Ameriprise Financial Services, LLC

07/2018 – 04/2019 Client Service Associate, Ameriprise Financial Services, LLC

10/2017 – 07/2018 Client Service Coordinator, Ameriprise Financial Services, LLC

Exams, Licenses & Other Professional Designations

2018 – Series 66 Exam, Series 7 Exam

-Behavioral Financial Advisor (BFA™)

-Certified Financial Planner™, (CFP®)

-Chartered Retirement Planning Counselor (CRPC™)

Item 3 – Disciplinary Information

Mr. DeBenedetto has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Mr. DeBenedetto has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Mr. DeBenedetto has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Mr. DeBenedetto is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Mary Jo Kohman

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Mary Jo Kohman and should be included with BlueStem Wealth Partners' main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Mary Jo is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD #1723275.

Item 2 – Education Background and Business Experience

Born 1965

Education

High School Graduate: Yes

Level of Post-Secondary Education: Bachelors

Business Background

02/2023 – Present	BlueStem Wealth Partners, Chief Operations Officer and Financial Advisor
04/2020 – 02/2023	Bluestem Wealth Partners, Chief Operations Officer and Advisor, affiliate of Ameriprise Financial Services, LLC
07/2019 – 04/2020	Ameriprise Financial Services, LLC, VP Business Program Management
05/2010 – 07/2019	Columbia Threadneedle Investments, VP National Account Manager

Exams, Licenses & Other Professional Designations

2010 – Series 66 Exam

2006 – Series 24 Exam

1989 – Series 63 Exam, Series 7 Exam

-Accredited Portfolio Management Advisor (APMA™)

-Behavioral Financial Advisor (BFA™)

-Certified Financial Planner™, CFP®

-Chartered Financial Consultant (ChFC®)

-Chartered Mutual Fund Counselor (CMFC™)

Item 3 – Disciplinary Information

Ms. Kohman has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Ms. Kohman has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Ms. Kohman has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Ms. Kohman is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Matthew Smith

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Matthew Smith and should be included with BlueStem Wealth Partners' main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Steven is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD# 7508522.

Item 2 – Education Background and Business Experience

Born 1995

Education

High School Graduate: Yes

Level of Post-Secondary Education: Bachelors

Business Background

02/2023 – Present BlueStem Wealth Partners, Financial Advisor

02/2022 – 02/2023 Bluestem Wealth Partners, Client Service Specialist, affiliate of Ameriprise Financial Services, LLC

Exams, Licenses & Other Professional Designations

2024 – Series 65 Exam

Item 3 – Disciplinary Information

Mr. Smith has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Mr. Smith has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Mr. Smith has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Mr. Smith is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Melissa Granlund

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Melissa Granlund and should be included with BlueStem Wealth Partners main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Melissa is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD# 5885437.

Item 2 – Education Background and Business Experience

Born 1976

Education

High School Graduate: Yes

Level of Post-Secondary Education: Bachelors

Business Background

02/2023 – Present BlueStem Wealth Partners, Financial Advisor

01/2011 – 02/2023 Licensed Paraplanner, Ameriprise Financial Services, LLC

Exams, Licenses & Other Professional Designations

2012 – Series 66 Exam

2011- Series 7 Exam

2022- Behavioral Financial Advisor (BFA™)

Item 3 – Disciplinary Information

Ms. Granlund has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Ms. Granlund has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Ms. Granlund has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Ms. Granlund is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Mindy Reid

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Mindy Reid and should be included with BlueStem Wealth Partners' main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Mindy is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD# 2941498.

Item 2 – Education Background and Business Experience

Born 1973

Education

High School Graduate: Yes

Level of Post-Secondary Education: Masters

Business Background

02/2023 – Present BlueStem Wealth Partners, Financial Advisor

11/2007 – 02/2023 Financial Advisor, Ameriprise Financial Services, LLC

06/1997 – 11/2007 Registered Principal Delegate, Ameriprise Financial Services, LLC

Exams, Licenses & Other Professional Designations

2006 – Series 4 Exam

2003 – Series 51 Exam

2002 – Series 24 Exam

1999 – Series 63 Exam, Series 7 Exam

-Accredited Portfolio Management Advisor (APMA™)

-Behavioral Financial Advisor (BFA™)

-Certified Financial Planner™, CFP®

-Certified Kingdom Advisor® (CKA®)

-Certification for Long-Term Care (CLTC®)

-Chartered Retirement Planning Counselor (CRPC™)

Item 3 – Disciplinary Information

Ms. Reid has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Ms. Reid has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Ms. Reid has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Ms. Reid is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Nancy Sandin

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Nancy Sandin and should be included with BlueStem Wealth Partners' main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Nancy is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD #4737353.

Item 2 – Education Background and Business Experience

Born 1975

Education

High School Graduate: Yes

Level of Post-Secondary Education: Some

Business Background

02/2023 – Present BlueStem Wealth Partners, Financial Advisor

04/2000 – 02/2023 Ameriprise Financial Services, Inc., Licensed Paraplanner

1992 – 2000 Crow River State Bank, Personal Banker and Teller

Exams, Licenses & Other Professional Designations

2019 – Series 66 Exam

2017 – Series 7 Exam

-Behavioral Financial Advisor (BFA™)

-Chartered Retirement Planning Counselor (CRPC™)

Item 3 – Disciplinary Information

Ms. Sandin has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Ms. Sandin has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Ms. Sandin has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Ms. Sandin is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Rachael van Gorkom

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Rachael van Gorkom and should be included with BlueStem Wealth Partners' main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Rachael is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD# 6144302.

Item 2 – Education Background and Business Experience

Born 1986

Education

High School Graduate: Yes

Level of Post-Secondary Education: Bachelors

Business Background

10/2023 – Present BlueStem Wealth Partners, Financial Advisor

Exams, Licenses & Other Professional Designations

2023 - Series 65 Exam

Item 3 – Disciplinary Information

Ms. van Gorkom has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Ms. van Gorkom has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Ms. van Gorkom has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Ms. van Gorkom is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Scott Marquardt

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Scott Marquardt and should be included with BlueStem Wealth Partners' main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Scott is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD# 4836766.

Item 2 – Education Background and Business Experience

Born 1978

Education

High School Graduate: Yes

Level of Post-Secondary Education: Bachelors

Business Background

02/2023 – Present BlueStem Wealth Partners, Financial Advisor

07/2004 – 02/2023 Financial Advisor, Ameriprise Financial Services, Inc.

Exams, Licenses & Other Professional Designations

2005 – Series 66 Exam, Series 7 Exam

-Accredited Portfolio Management Advisor (APMA™)

-Behavioral Financial Advisor (BFA™)

-Certified Financial Planner™, CFP®

-Certified Kingdom Advisor® (CKA®)

Item 3 – Disciplinary Information

Mr. Marquardt has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Mr. Marquardt has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Mr. Marquardt has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Mr. Marquardt is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

Stephanie Sutton

Financial Advisor

Item 1 – Cover Page

This brochure supplement provides information about Stephanie Sutton and should be included with BlueStem Wealth Partners' main brochure. Please contact Andy Warning if you did not receive a copy of BlueStem Wealth Partners' brochure or if you have questions about the contents. Additional information about Stephanie is available at the SEC's website at www.adviserinfo.sec.gov by searching CRD# 6510064.

Item 2 – Education Background and Business Experience

Born 1993

Education

High School Graduate: Yes

Level of Post-Secondary Education: Bachelors

Business Background

02/2023 – Present	BlueStem Wealth Partners, Financial Advisor
01/2022 – 02/2023	Financial Advisor, Ameriprise Financial Services, LLC
11/2019 – 01/2022	Licensed Paraplanner, Ameriprise Financial Services, LLC
07/2016 – 11/2019	Financial Consultant, Ameriprise Financial Services, LLC

Exams, Licenses & Other Professional Designations

2017 – Series 66 Exam, Series 63 Exam, Series 7 Exam

-Certified Financial Planner™, CFP®

Item 3 – Disciplinary Information

Ms. Sutton has no information applicable to this item to disclose.

Item 4 – Other Business Activities

Ms. Sutton has no information applicable to this item to disclose.

Item 5 – Additional Compensation

BlueStem Wealth Partners is required to disclose information regarding any arrangement under which Ms. Sutton has an economic benefit from someone other than a client for providing investment advisory services. BlueStem Wealth Partners has no information to disclose in relation to this Item.

Item 6 – Supervision

Ms. Sutton is supervised by Andy Warning, BlueStem Wealth Partners' Chief Compliance Officer. His contact information can be found on the cover page of this brochure. Mr. Warning, and other individuals he may designate from time to time, regularly review the firm's advisory services and offerings to monitor suitability of recommendations and compliance with regulatory requirements and firm procedures.

PROFESSIONAL DESIGNATIONS

ACCREDITED PORTFOLIO MANAGEMENT ADVISOR (APMA™)

The APMA® certification is administered by the College for Financial Planning (CFFP), a Kaplan Financial Education company. The certification program covers a wide range of financial planning topics, including portfolio management techniques, portfolio theory, asset allocation, risk analysis, investing in mutual funds vs. index funds, retirement planning, debt funding, behavioral finance, and others.

BEHAVIORAL FINANCIAL ADVISOR (BFA™)

The Behavioral Financial Advisor (BFA™) designation is issued by Kaplan Financial Education. No federal or state law requires financial planners to hold BFA certification. The overall goal of the BFA training is to equip advisors to be financial coaches who can help integrate the conventional financial knowledge about markets and investing they've acquired through experience or other education with findings from psychology and neuroscience.

To obtain the right to use the BFA designation, an individual must satisfactorily fulfill the following requirements:

- Education – Completion of 2 courses related to behavioral finance
- Examination – Course exams and final certification exam (online, timed, proctored)

Individuals who become certified must complete 20 hours of continuing education requirements every 2 years in order to maintain the right to continue the use of the BFA designation.

CHARTERED FINANCIAL CONSULTANT (ChFC®)

The ChFC® program covers a list of requirements for financial advisors, from knowledge on tax and retirement planning to special needs advising, wealth management, insurance, income tax, retirement, risk management, estate planning, and investments. Chartered Financial Consultant designations are granted by the American College upon completion of seven required courses and two elective courses. After earning the designation, earning continuing education credits is required.

CHARTERED RETIREMENT PLANNING COUNSELOR, CRPC®

Individuals who hold the CRPC® designation have completed a course of study encompassing pre-and post-retirement needs, asset management, estate planning and the entire retirement planning process using models and techniques from real client situations. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

CERTIFIED FINANCIAL PLANNER™, CFP®

Federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 71,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- **Education** – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor’s Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- **Experience** – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- **Ethics** – Agree to be bound by CFP Board’s Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- **Continuing Education** – Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and
- **Ethics** – Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

CERTIFICATION FOR LONG-TERM CARE (CLTC®)

Individuals who hold the CRPC® designation have completed a course of study encompassing pre-and post-retirement needs, asset management, estate planning and the entire retirement planning process using models and techniques from real client situations. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

CHARTERED MUTUAL FUND ADVISOR (CMFC)

Chartered Mutual Fund Counselor (CMFC) is a professional designation for mutual fund advisers. It was previously awarded by the College for Financial Planning, now part of Kaplan, to financial services professionals who completed a study program and passed an exam covering mutual fund topics. While it is no longer a current certification offered by Kaplan/College for Financial Planning, as of 2021, the organization still supports the designation.

CERTIFIED KINGDOM ADVISOR (CKA)

The CKA is a certification designed for professionals serving clients in the Christian faith and who take a values-based approach to financial matters. It involves a course of study that integrates biblical principles with core financial advisory training. Essentially, CKA holders frame their financial expertise within a worldview consistent with Christian teachings.