

Form ADV, Part 2B
Brochure Supplement
For
Elisabeth Olson

April 04, 2022



O.N. Investment Management Company
One Financial Way
Cincinnati, OH 45242
(877) 663-7267

Elisabeth Olson
4025 Automation Way, C1
Fort Collins, CO 80525
(972) 682-5374

This Brochure Supplement provides information about the representative that supplements the O.N. Investment Management Company (“ONIMCO”) Firm Brochure. You should have received a copy of the Firm Brochure. Please contact O.N. Investment Management Company at (877) 663-7267 if you did not receive ONIMCO’s Firm Brochure or if you have any questions about the contents of this Brochure Supplement.

Additional information about the Investment Adviser Representative (“IAR”) is available on the SEC’s Website at www.adviserinfo.sec.gov.

Educational Background and Business Experience

IAR Name: Elisabeth Olson **Year of Birth:** 1962

Formal Education: University of North Texas – BS in Secondary Education
Eastern University – MBA in Organizational Leadership

Five Year Business Background:

O.N. Investment Management Company
01/2019-Present Investment Adviser Representative

The O.N. Equity Sales Company
01/2019-Present Registered Representative

Waddell & Reed
08/2016-01/2019 Registered Representative

The O.N. Equity Sales Company
03/2016-08/2016 Registered Representative

Retirement and Estate Advisors
08/2015-08/2016 Financial Planner in Training

St. Vrain Valley School District
06/2015-08/2015 Math Teacher

Unemployed
05/2015-06/2015 Unemployed

Weld County School District RE4
08/2014-05/2015 Secondary Math Teacher

Disciplinary Information

This individual has no disciplinary history to disclose.

Other Business Activities:

Registered Representative with The O.N. Equity Sales Company (“ONESCO”) – The IAR is a Registered Representative with ONESCO, in which the IAR acts as a Registered Representative of the broker/dealer to effect securities transactions on behalf of the client and earns a commission. ONESCO is the parent company of ONIMCO and uses the same facilities at the same address as ONIMCO. Acting as an IAR and as a Registered Representative for the same client creates a potential conflict of interest since the IAR will earn a fee for preparing a financial plan and earn a commission for effecting securities transactions that may have been recommended in the financial plan. This conflict may provide the IAR with an incentive to recommend the purchase of a security to the client in order to receive compensation. ONIMCO monitors the activities of the IAR and ONESCO monitors the activities of the Registered Representative. To deal with this potential conflict, Financial Plan Review Principals employed by ONIMCO review the financial plans prepared for a fee to verify that the recommendations are appropriate based upon the needs of the individual client.

The Investment Adviser Representative also acts as an insurance agent and may be appointed with various insurance companies to effect insurance transactions on behalf of clients and earns a commission. Acting as an IAR and as an insurance agent for the same client creates a potential conflict of interest since the IAR may receive compensation for developing a financial plan and may earn a commission on the sale of the insurance product to a client. This conflict may provide the IAR with an incentive to recommend the purchase of an insurance product as part of the financial planning process. To deal with this potential conflict, Financial Plan Review Principals employed by ONIMCO review the financial plans prepared for a fee to verify that the recommendations are appropriate based upon the needs of the individual client.

Additional Compensation:

There is no additional information to disclose.

Supervision:

Andrew VanHoy is the Chief Compliance Officer and can be reached by contacting ONIMCO at (877) 663-7267. Mr. VanHoy oversees the Compliance Department which is responsible for reviewing financial plan submissions, as well as Managed Account and Mutual Fund Wrap Account activity. The investment advice provided is reviewed for each client by a Home Office compliance representative.

