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## STEVEN HARPHAM PART 2B ITEM 1 - COVER PAGE ADV PART 2 B BROCHURE

This supplemental information is about Steven Harpham, registered investment advisor of Range Financial Group, LLC (“Range Financial Group”). Additional information about Range Financial Group is also available at the SEC’s website [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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STEVE@RANGEFINANCIALGROUP.COM

(503) 482-4400

CRD # 5601841

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## ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

### Steven Harpham

steve@rangefinancialgroup.com

Year Born: 1960

### Educational Background:

Masters, Personal Financial Planning – College for Financial Planning (2018)

Bachelors, Business – Warner Pacific College (1986)

Bachelors, Theology – Portland Bible College (1983)

### Business Background:

03/2020 – Present: *Investment Advisor Representative*, Range Financial Group, LLC

08/2016 – 02/2020: *Investment Advisor Representative*, Anderson Fisher LLC dba Human Investing

09/2010 – 08/2016: *Registered Representative*, G.A. Repple & Company

07/2007 – 12/2013: *Partner*, SH and PH LLC

### Professional Designations:

#### Certified Financial Planner (CFP®)

A CFP® is a well-qualified financial professional who uses various strategies to help clients. CFP®s often analyze a client’s current situation and prepares a number of financial reports as part of an overall financial plan. CFP®s may also assist with investment planning, insurance planning, estate planning, income tax planning, and retirement planning.

While many other professional designations concentrate only on investment management, the CFP® focuses on holistic financial planning. In addition, CFP®s stand out because they are fiduciaries, meaning they have a duty to put clients’ best interests ahead of their own. For example, they cannot buy financial products for clients for the sole purpose of earning high commissions.

To earn a CFP financial professionals must complete certain education and experience requirements as well as pass a rigorous exam that is distributed by the [CFP Board](#). The goal of this exam is to evaluate their ability to apply financial knowledge to all type of situations.

More information related to the CFP® designation may be found [here](#).

### Certified Kingdom Advisor (CKA)

Certified Kingdom Advisor® is a designation granted by Kingdom Advisors to individuals who have satisfied Kingdom Advisors standards that demonstrated themselves to be:

Ability to Apply Biblical Wisdom in Financial Counsel:

By successfully completing the rigorous Certified Kingdom Advisor® coursework and examination.

Technically Competence:

By providing evidence of an approved professional designation (varying by discipline) or by having at least 10 years full-time experience in their discipline.

Ethical Practice:

By agreeing to espouse and practice the [Kingdom Advisors Code of Ethics](#), by maintaining active local church involvement, and by providing pastoral and client letters of reference.

Biblical Stewardship:

By pledging that they practice biblical stewardship in their personal and professional lives and by giving regularly in proportion to their income.

CKA® Disciplines as Defined by Kingdom Advisors:

-Certified Kingdom Advisor® Financial Planner-

Financial planning is the process of determining whether and how an individual can meet life goals through the proper management of financial resources. Financial planning integrates the financial planning process with the financial planning subject areas outlined below by the CFP® Board of Standards

- Financial statement preparation and analysis (including cash flow analysis/planning and budgeting)
- Insurance planning and risk management
- Employee benefits planning
- Investment planning
- Income tax planning
- Retirement planning
- Estate planning

Experience Requirements: 10 years full-time experience OR one of the following professional designations: CFP®, ChFC®, CPA/PFS (Canada: RFP, PFP, CIM, CSWP)

-Certified Kingdom Advisor® Investment Professional-

An investment professional provides professional expertise to the management of investment assets held in retirement accounts, trusts, individual and joint accounts. This type of advisor is registered with the SEC/CSA or State and “flat fee” paid for advice, or they are registered with a Broker Dealer and paid on a commission basis.

Experience Requirement: 10 years full-time experience OR one of the following professional designations: CFP®, ChFC®, CPA/PFS, CFA®, CIMA, AAMS® (Canada: RFP, PFP, CIM, CSWP)

#### Chartered Retirement Planning Counselor (CRPC)-

The CRPC® designation program is designed for advisors who wish to provide more comprehensive retirement planning advice to individual clients and families. This program enables experienced advisors, who are focused on retirement planning for individuals, define a “road map to retirement.” There is a focus on clients’ pre- and post-retirement needs, as well as issues related to asset management and estate planning.

Further information regarding the CRPC designation may be found [here](#).

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#### **ITEM 3 - DISCIPLINARY INFORMATION**

Steven Harpham has no legal or disciplinary events that are material to you or a prospective client’s evaluation of this advisory business.

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#### **ITEM 4 – OTHER BUSINESS ACTIVITIES**

The principal business of Steven Harpham is that of an investment advisor representative.

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#### **ITEM 5 - ADDITIONAL COMPENSATION**

Other than work with Range Financial Group and any disclosures made in Items 2 and 4 above, Steven Harpham receives no additional compensation related to outside business activities.

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#### **ITEM 6 - SUPERVISION**

Steven Harpham is not a supervising authority at Range Financial Group but does work closely with the supervising member of the firm. The supervising member is Eric Dahm; who remains aware of and keeps us in compliance with the current rules and regulations put forth by each ruling regulatory authority where we conduct our business. Range Financial Group has established internal policies for the guidance of its trading personnel. Transactions, which vary from the guidelines, are subject to periodic supervisory review. These guidelines are reviewed yearly and periodically adjusted.

Eric R. Dahm is located at 7307 SW Beveland St, #110 Tigard, Oregon 97223 and can be reached by calling (503) 482-4400.

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**ITEM 7 - REQUIREMENTS FOR STATE-REGISTERED ADVISERS**

Other than any disclosures made in Item 3 above, Steven Harpham has not been found liable in any additional material arbitration or liable in a civil, self-regulatory organization, or administrative proceeding involving an investment or an investment-related business or activity; fraud, false statement(s), or omissions; theft, embezzlement, or other wrongful taking of property; bribery, forgery, counterfeiting, or extortion; or dishonest, unfair, or unethical practices. Steven Harpham has not been the subject of a bankruptcy petition in the past 10 years.