

Form ADV Part 2A Disclosure Brochure

Quantum Financial Partners LLC

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Website: www.quantumfinancialpartners.com

April 10, 2026

This brochure provides information about the qualifications and business practices of Quantum Financial Partners LLC. If you have any questions about the firm and/or the contents of this brochure, please contact us at (402) 513-0555, or e-mail Adam Musfeldt at amusfeldt@qfpwealth.com

The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Quantum Financial Partners LLC also is available at the SEC's website at www.adviserinfo.sec.gov.

Note: Quantum Financial Partners LLC is an SEC registered investment advisor. Registration as an investment adviser does not imply any type of endorsement by these authorities nor does it infer that we have attained any specified level of skill or training.

Item 2 – Material Changes

This Brochure dated April 10, 2026, represents an amendment to the Brochure for Quantum Financial Partners LLC.

Since the filing of the firm's last annual update Brochure on March 26, 2026, we have made various minor updates to our Brochure, but no other material changes were made.

Pursuant to regulatory requirements, we will deliver to you a summary of any material changes to this and subsequent Brochures within 120 days of the close of our fiscal year. We may further provide other ongoing disclosure information about material changes as necessary. All such information will be provided to you free of charge.

Currently, our Brochure may be requested by contacting us at (402) 513-0555.

Additional information about the firm is also available via the SEC's web site www.adviserinfo.sec.gov. The SEC's web site also provides information about any persons affiliated with the firm who are registered as investment adviser representatives of the firm.

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Item 4 – Advisory Business

Quantum Financial Partners LLC, (“Quantum”), a Kansas limited liability company, was founded in October 2003, by Jeffrey A. White and Kenrick H. Moore. Mr. White, Mr. Moore, Mr. Adam Musfeldt and Mr. David Baumann are the owners of the firm. Quantum is headquartered at 8700 Indian Creek Parkway, Suite 150, Overland Park, KS, 66210, and has a branch office at 3803 N. 153rd St., Suite 202, Omaha NE 68116.

Quantum provides investment advisory services to individuals, small businesses, and foundations primarily through the management of individual accounts that are tailored to each client’s investment goals and objectives. Quantum may also delegate discretion to outside managers with client approval. Goals and objectives are assessed through face-to-face discussions with each client and through a client questionnaire documenting such items as risk tolerance and other appropriate factors which help guide the firm in determining the allocation of each client’s account.

Clients have the authority to determine what restrictions, if any, they wish to impose on their account(s) and any holdings within them but are required to do so in writing.

Because Quantum is a registered investment adviser, we are required to meet certain fiduciary standards when providing investment advice to clients. Additionally, when we provide investment advice related to a retirement plan account or an individual retirement account, we are considered fiduciaries within the meaning of Title I of the Employee Retirement Income Security Act and/or the Internal Revenue Code, as applicable, which are laws governing retirement accounts. As such, we are required to act in your best interest and not put our interest ahead of yours, even though our compensation creates some conflicts with your interests in that the more you have us manage, the more we can earn. Our clients, however, are under no obligation to use services recommended by our associated persons. Furthermore, we believe that our recommendations are in the best interests of our clients and are consistent with our clients’ needs.

All client accounts are held at a third-party custodian, Charles Schwab & Co., Inc., and are the property of the client. Quantum receives authority from the clients to trade in the clients’ accounts with full discretion but has also accepted some non-discretionary accounts.

Additionally, Quantum functions as the investment manager for a limited partnership, Octopus LP (a Delaware Limited Partnership). Quantum also serves as the general partner of the Partnership, is responsible for the day-to-day administration and has discretionary investment authority over the Partnership’s assets. As the managers and controlling persons of the General Partner, Mr. Jeffrey A. White, Kenrick H. Moore, and Adam Musfeldt control all the Partnership’s operations and activities.

Octopus LP was formed in 2009 to pool investment funds of its investors (each a “Limited Partner” and, collectively, “Limited Partners”; and together with the General Partner, “Partners”) for the purpose of investing and trading in a variety of securities and financial instruments, domestic and foreign, primarily in publicly traded equity securities, high grade bonds and U.S. treasuries, and high yield bonds. Octopus LP may only be offered to investors in states where such offering is permitted by applicable state law. For example, although Quantum is registered in the state of Texas, Octopus LP is not currently offered in Texas.

As of December 31, 2025, the firm managed both client and Octopus LP fund assets totaling

approximately \$148,559,060, all of which was managed on a discretionary basis.

Item 5 – Fees and Compensation

For investment management services, Quantum charges clients an annual asset-based fee based on a percentage of assets in the client's account. Annual fees range from 0.70 to 1.50% annually, and are negotiated based on type of account, level of service provided, and other account related factors. Fees are calculated and paid in advance at the beginning of each quarter according to the opening balance in the client's account on the first business day after the end of each quarter. Fees are generally collected through automatic withdrawal from the client's account. In other words, 0.25% of the value of each client's account is withdrawn and paid to Quantum every three months for an account charged 1%.

Fees for partial quarters are subject to prorated adjustments at the firm's discretion based on the number of days assets are under management (e.g. new accounts, terminated accounts, cash inflows into existing accounts, cash outflows from an existing account, etc.) In the event a client wishes to terminate advisory service before the end of a quarterly billing period, any un-earned advisory fee paid in advance will be prorated and refunded upon termination to the corresponding client account in which the client terminated services.

Clients are responsible for any account related fees, charges, or commissions charged by the custodian or any other outside party.

For management of the pooled fund, Quantum charges a quarterly asset based fee based on a percentage of assets in the fund plus a performance incentive fee if performance exceeds a specific hurdle rate. Fees are negotiated with each fund on a case by case basis. The annual rate of the base fee is 1% for Octopus LP. Details about base and performance fees are found in the fund's Private Placement Memorandum.

Item 6 – Performance-Based Fees and Side-By-Side Management

The firm manages accounts both with and without performance -based fees (fees based on a share of appreciation in value of the assets of a client). Consequently, the firm may simultaneously manage both performance fee-based accounts as well as non-performance fee based accounts. Managing performance based and non-performance based accounts simultaneously may create a conflict of interest in that we may have an incentive to favor accounts for which we receive a performance-based fee over accounts for which we do not. Performance-based fees may only be charged in accordance with regulatory restrictions (e.g. clients must be qualified, etc.) but are currently only charged to subscribers participating in the Octopus Limited Partnership, and only for the portions subscribed to in the Limited Partnership.

Generally, we feel that the potential conflict of interest is somewhat limited because of variations in investment strategies, tax considerations, etc. between the account we manage for Quantum Financial Partners relative to accounts we manage for other clients.

While the ultimate goal in every account is to be profitable, because of each account's unique characteristics and our relatively small number of clients, we trade each account differently and make

the trades at different times. Nonetheless, if a conflict does exist, we will endeavor to place the trade in the smaller accounts first to avoid a possible adverse pricing situation created due to a pooled fund's (usually) larger trade size.

Item 7 – Types of Clients

Although Quantum has a pooled fund as a client, most clients are individual investors holding qualified and/or non-qualified accounts. However, our client list also includes family trusts, corporations, foundations, and business entities. The firm does not require minimum assets to open and/or maintain an account but reserves the right to decline certain engagements.

Item 8 – Types of Investments, Methods of Analysis, Investment Strategies and Risk of Loss

Quantum specializes in the management of qualified and non-qualified investment accounts. Our primary investment strategy is to add value through the individual analysis and selection of publicly traded stocks, bonds, mutual funds, exchange traded funds, and limited partnerships.

The types of investment we may hold include common stock, mutual funds, exchange traded funds, corporate debt, municipal securities, Investment limited partnerships, commercial paper, certificates of deposit, United States government securities, and other equity and/or fixed-income securities. We may also utilize short sales, margin transactions and option writing depending on the type of account.

Investing involves risks of loss that all clients should be prepared to bear. Quantum discusses with clients the risks involved in investing in any type of security and that they will bear these risks in their account. We never promise or guarantee any level of return or appreciation on any type of security or asset and we feel it is important that clients know and understand this.

When analyzing any investment option, we may use fundamental, technical, and or quantitative analysis, and may gather information from financial newspapers and periodicals, on-line research, television and other media, corporate activities, third-party research materials, corporate rating services, annual reports, prospectuses, filings with the Securities and Exchange Commission, and company press releases.

No individual method of investment analysis is without its own weaknesses and associated risk.

Fundamental analysis evaluates numbers such as earnings, revenues, cash flow, debt; also monitors external factors like competitors and regulatory environment as well as qualitative factors such as management talent and growth prospects. In our case, the biggest risk is that Quantum relies on the talent of the person doing the analysis. Whether the analyst is a pro that does a detailed report or an advisor that does a more superficial evaluation; it is understood that the analyst is relying on numbers that are backward looking, projections that are only educated guesses, and a grasp of company and industry knowledge that may be insufficient to properly weigh the multitude of factors that determine an investments' efficacy.

Quantitative analysis deals strictly with the numbers; any performance metric that can be quantified. This can include growth rates, cash flow, debt ratios, and many others. At Quantum, the numbers are often a place to start when looking for investment ideas. There are several online tools that allow us to

screen stocks by inputs of whatever quantitative criteria deemed relevant to the investment idea we want to pursue. The risk of an exclusive reliance on quantitative analysis is that it ignores important fundamental and technical factors such as economic climate, management talent, company prospects, and investor sentiment. Like Fundamental analysis, it is also subject to numbers that are backward looking, and forward projections that may or may not transpire.

Technical analysis is the study of price action. This can include the evaluation of price, volume, trends, moving averages, chart formations, stochastics, and other criteria. The analyst will attempt to divine future price direction based on historical price trends. Technical analysis is sometimes described as a visual indicator of investor sentiment. At Quantum, we often turn to technical analysis to help us determine entry and exit points for stock and index investing. The danger of an over-reliance on technical analysis is that since we feel it's an indicator of market sentiment, it can lead to investing with herd mentality rather than a more independent evaluation based on the fundamentals. Further, due to the existence of numerous technical indicators, it is often the case that the indicators will contradict each other and give mixed signals, leaving the analyst to arbitrarily choose which measure to rely on. As with other methods of analysis, success is highly dependent on the skill of the analyst.

Item 9 - Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to the evaluation of the firm or the integrity of its management. During a routine regulatory audit in 2018, the firm was made aware of financial statement and regulatory notification deficiencies which the firm promptly corrected. The deficiencies resulted in a \$10,000 fine which the firm promptly paid. Neither Quantum nor its representatives have been a party to any other industry disciplinary actions or civil or criminal legal proceedings.

Item 10 - Other Financial Industry Activities and Affiliations

Some representatives of Quantum are licensed insurance agents and earn commissions when insurance products are purchased through them. Clients are however under no obligation to purchase products or services through Quantum or Quantum representatives.

Some representatives of Quantum also have an ownership interest in AHI Insurance, a property and casualty insurance agency.

Quantum Financial Partners does not have any financial industry affiliations.

Item 11 – Code of Ethics, Participation or Interest in Client Transactions and Personal Trading

Quantum has a professional *Code of Ethics* document outlining the expectations of professional conduct for all supervised employees. All employees are required to review and sign this document, a copy of which is maintained in their employee file. A copy of our *Code of Ethics* is available to all clients and prospective clients upon request.

Individuals associated with Quantum are permitted to buy or sell securities for their personal accounts

identical to or different than those recommended to clients. However, no person is allowed to favor his or her own interest over that of a client or make personal investment decisions based on the investment decisions of advisory clients.

Item 12 – Brokerage Practices

The Custodians and Brokers We Use

Quantum does not maintain custody of client assets. Instead, we require all client assets be maintained in an account at a non affiliated “qualified custodian”, generally a broker dealer or bank. While we may recommend Charles Schwab & Co., Inc. as a broker/custodian, you will ultimately decide whether to use our recommended firm and will open your account directly with them. Non-recommended brokers and custodians will only be considered in limited instances, and on a case by case basis.

How We Select Custodians and Brokers

When recommending brokers or custodians for its clients, we consider many different factors including quality of service, services offered, execution quality, transaction costs, reputation of the firm, financial resources, and stability, among others. In determining the reasonableness of a broker’s compensation, we consider the overall cost to you relative to the benefits you receive, both directly and indirectly, from the broker.

Your Brokerage and Custody Costs

Our clients receive various services directly from our custodian. For our clients’ accounts that our custodian maintains, the custodian generally does not charge separately for custody services but instead is compensated by charging commissions or other fees on trades that it executes or trades that are executed by other brokers to and from the custodial accounts. Our relationship to the custodian and its relationship to the client are entirely independent of trade commission assessed by the custodian in client accounts.

Since our custodian charges you a fee for each trade that we have executed by a different broker-dealer, we have the custodian execute most trades for your account in order to minimize your trading costs. We have determined that having the custodian execute most trades is consistent with our duty to seek “best execution” of your trades. Best execution means seeking the most favorable terms for a transaction based on all relevant factors, including those listed above.

Products and Services Available to Us from Brokers/Custodians

Our custodian provides us and our clients access to its institutional brokerage services such as custody, reporting, trade brokerage, research and related services, many of which are not typically available to retail clients. Our custodian also makes available various support services to facilitate management and administration of client accounts and other services to support growth of our business. Although we may receive such soft dollar benefits, we have no formal soft dollar agreements.

The availability of these services from our custodian benefits us because we do not have to produce or

purchase them. Of course, this may give us an incentive to recommend that you maintain your account with our custodian based on our interests rather than yours, which is a potential conflict of interest. We believe, however, that our selection of our custodians is in the best interests of our clients, and is primarily supported by the scope, quality, and price of our custodians' services and not those services that benefit only us.

Aggregation and Allocation of Transactions

The firm may, from time to time, aggregate client orders into blocks in order to facilitate more efficient account management and execution. When aggregating orders, an average price is given to all participants in the block, or other measures are taken, in order to treat accounts more fairly. The firm may also rotate trade allocation in order to facilitate more equitable trade execution. When rotating orders, the firm rotates the broker/custodian used in order to treat all accounts more fairly.

Item 13 – Review of Accounts

Reviews - All client accounts are reviewed internally at least monthly by a principal of Quantum. We also meet with clients periodically as agreed upon with the client to discuss their Quantum account.

Reports - Clients receive monthly statements from their 3rd party custodian detailing their account activity and balances. Performance reviews may also be provided to clients periodically at the discretion of the firm. At the time of the execution of a trade, trade confirmations are delivered by the custodian either electronically or via mail as directed by the client.

Item 14 – Client Referrals and Other Compensation

Quantum does not pay clients, nor provide any type of benefit, for client referrals.

Quantum may receive economic benefits from our custodians in the form of the support products and services that are made available to us and to other independent investment advisors. These products and services, how they benefit us, and the related conflicts of interest are described in Item 12 above. The availability to us of our custodian's products and services is not based on us giving particular investment advice, such as buying particular securities for our clients.

Item 15 – Custody

As noted in Item 12, Quantum requires that client assets be held by a qualified custodian. We may however have limited control in some instance to trade on a client's behalf, to deduct advisory fees from client accounts with client authorization, or to request distributions to clients and outside parties (although various types of written authorizations are required depending on the types of disbursements.)

Quantum urges clients to carefully review custodian statements and compare them to any account reports we might provide.

Quantum also acts as a general partner for a pooled investment fund, and as such is considered under securities laws to have a form of custody over these funds. However, client assets are not directly held by the firm but rather are held by the fund's custodian, and all funds are subject to annual independent audits. Additionally, a third-party administrator, Grassi Advisors and Accountants, provides certain administrative services to the fund and will deliver account statements to the fund and the fund's partners on at least a quarterly basis.

Item 16 – Investment Discretion

Clients generally grant the firm the authority to determine what securities will be purchased, retained or sold in the client's account, although the firm has accepted some non-discretionary accounts. Any discretionary authority accepted however is subject to the client's risk profile and investment objectives and may be limited by any other limitations provided by the client in writing.

The firm will not exercise any discretionary authority until it has been given authority to do so in writing. Such authority is granted in the written agreement between the firm and the client, and in the written agreement with the third party custodian.

Item 17 – Voting Client Securities

Quantum does not vote proxies related to its clients' securities. Clients may receive proxies from their custodian or from companies in which we have invested. Although we do not vote proxies on behalf of clients, clients may contact us with questions regarding corporate voting.

Item 18 – Financial Information

Registered investment advisers are required in some cases to provide certain financial information and or disclosures about financial condition. For example, if Quantum requires prepayment of fees for six months in advance, has custody of client funds, or has a condition that is reasonably likely to impair its ability to meet its contractual commitments to its clients, it may be required to provide financial information and make certain disclosures.

Although the firm is considered to have custody of client funds through its control as general partner of its pooled fund, it is operating under an exemption to Kansas custody safekeeping requirements related to additional financial reporting. Furthermore, Quantum has no financial or operating conditions which trigger any other financial reporting requirements.

Form ADV Part 2B Brochure Supplement

David S. Baumann

Quantum Financial Partners LLC

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Primary Contact: Adam Musfeldt

Managing Partner

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Website: **www.quantumfinancialpartners.com**

April 10, 2026

This brochure provides information about David S. Baumann that supplements the Quantum Financial Partners LLC Brochure which you should have received. Please contact us at (402) 513-0555, or e-mail Adam Musfeldt at amusfeldt@qfpwealth.com if you did not receive the QFP Brochure or if you have any questions about it or the contents of this supplement.

The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

Additional information about Mr. Baumann is available at the SEC's website at www.adviserinfo.sec.gov.

Note: Quantum Financial Partners LLC is an SEC registered investment advisor. Registration as an investment adviser does not imply any type of endorsement by these authorities nor does it infer that we have attained any specified level of skill or training.

Item 2- Educational Background and Business Experience

David S. Baumann, born in 1969, joined the firm in 2016 as an investment advisor representative. Prior to joining the firm, he was a financial advisor for Swartzbaugh Farber and registered representative of M Holdings Securities, Inc. from 2015 to 2016. He was also a registered representative for Wells Fargo Advisors LLC from 2013 through 2015, and for Securian Financial Services from 2006 through 2013.

Mr. Baumann earned a BA in Business Administration from the University of Nebraska Lincoln.

Item 3- Disciplinary Information

Mr. Baumann is currently not subject to, nor has ever been subject to, any legal or disciplinary events of a material nature.

Item 4 - Other Business Activities

Mr. Baumann is an independent licensed insurance agent and may earn compensation related to his insurance sales activities. While QFP will endeavor at all times to put the interest of clients first as part of its fiduciary duty, clients should be aware that the receipt of additional compensation creates a potential conflict of interest and may affect the judgment of individuals who make recommendations. However, our clients are under no obligation to purchase products recommended by our associated persons or to purchase products through our associated persons. We believe that our recommendations are in the best interests of our clients and are consistent with our clients' needs.

Mr. Baumann also has ownership interest in BTMD LLS, a real estate and small business investment business.

Item 5 - Additional Compensation

Mr. Baumann does not receive any economic benefits, sales awards, or other compensation in connection with providing advisory services to clients.

Item 6 - Supervision

Mr. Baumann reports to Adam Musfeldt, the firm's Chief Compliance Officer. Mr. Musfeldt provides compliance oversight for the firm and can be contacted at (402) 513-0555.

Form CRS - Customer Relationship Summary

Quantum Financial Partners LLC

Quantum Financial Partners LLC is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Brokerage and investment advisory services and fees differ and it is important for you to understand these differences. Free and simple tools are available to research firms and financial professionals at www.investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.

What investment services and advice can you provide me?

We provide portfolio management to our clients and also manage a separate pooled investment fund.

When providing portfolio management services, we not only make ongoing investment decisions but also implement these decisions and provide ongoing investment monitoring and reporting. We do not limit clients to certain investment types nor do we sell proprietary investment products, but we do make our pooled investment fund available to clients. Portfolio management services are tailored to your individual needs and you may impose restrictions related to level of discretion granted, the types of investment used, etc. We do not require a minimum account size but reserve the right to accept or decline any engagement.

For additional information about the services we provide, please see Item 4 of our Form ADV Part 2A Brochure which is available at <https://adviserinfo.sec.gov/firm/summary/138112>.

Key questions to ask your financial professional:

Given my financial situation, should I choose an investment advisory service? Why or why not? How will you choose investments to recommend to me? What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?

What fees will I pay?

When providing portfolio management services, we charge an ongoing asset based fee. Asset based fees give an advisor an incentive to increase the assets in a client account since the more an investor has in an account, the more the investor will pay in fees. Our fee is calculated and deducted directly from your account quarterly in advance and may be adjusted for cash flows at the firm's discretion. Our fee is separate from all brokerage charges and any other custodial fees or expenses, mutual fund or ETF expenses, taxes, or other fees charged by outside parties.

You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying.

For additional information about the fees we charge, please see Item 5 of our Form ADV Part 2A Brochure at <https://adviserinfo.sec.gov/firm/summary/138112>.

Key questions to ask your financial professional:

Help me understand how these fees and costs might affect my investments. If I give you \$10,000 to invest, how much will go to fees and costs, and how much will be invested for me?

What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?

When we act as your investment adviser, we have to act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about these conflicts because they affect the investment advice we provide you. Here are some examples to help you understand what this means.

Some firms trade investments from their own inventory with their clients. We do not engage in these activities. We do, however, share revenues with outside managers when directing business and managed a pooled fund for which we receive incentive compensation. We also receive some non-monetary benefits from our custodian to whom we direct business and the receipt of these benefits is considered a conflict of interest because we do not have to produce or purchase them.

For additional information about our custodial arrangement, please see Item 12 of our Form ADV Part 2A Brochure at <https://adviserinfo.sec.gov/firm/summary/138112>. For additional information about the pooled fund we manage, see Item 4 and Item 5.

Key questions to ask your financial professional:

How might your conflicts of interest affect me, and how will you address them?

How do your financial professionals make money?

Our financial professionals are compensated with revenue sharing related to servicing of accounts. Our financial professionals do not receive economic benefits or other compensation from outside parties for advisory services.

Do you or your financial professionals have legal or disciplinary history?

Yes. Visit Investor.gov/CRS for a free and simple search tool to research us and our professionals.

Key questions to ask your financial professional:

As a financial professional, do you have any disciplinary history? For what type of conduct?

Where to go for additional information

Please visit our website at www.gfp-llc.com or contact us at 913-538-5753 for a current copy of this summary, for our Form ADV Part 2 Brochure, or for additional information about our firm.

Key questions to ask your financial professional:

Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer? Who can I talk to if I have concerns about how this person is treating me?

Quantum Financial Partners, LLC
8700 Indian Creek Pkwy., Suite 150, Overland Park, KS 66210
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PRIVACY POLICY

As required by applicable law, we deliver a Privacy Policy to all of our clients upon establishing a relationship with them and annually thereafter, in order for our clients to understand how we use the information we gather from them.

When performing services for clients, we may collect non-public personal information such as:

- Information received in conversations, discussions and interviews.
- Information received on applications, forms, or other written documents.
- Information received from third parties on a client's behalf.

This information may include name, address, social security number, assets, etc. Although our own outside service providers may have access to your information for normal operational purposes (e.g. offsite electronic file storage, etc.), it is our policy not to disclose any non-public personal information about any client or former client except as may be required or permitted by law, or except as otherwise detailed in this policy. We may also use certain artificial intelligence tools (AI) for various business or client related purposes (such as recording and summarizing meetings), but we have strict policies related to the use of AI including the tools which may be used and the use and retention of results, and we allow client to opt out of meeting recordings.

Disclosures which may be permitted may include the following:

- Instances where a client or former client has authorized us to work with service providers such as attorneys, accountants, and other investment advisors.
- Instances where a client or former client has authorized us to disclose information to third parties that assist in processing client transactions or in servicing client accounts.

Clients and former clients may opt out from our sharing of information with most of the aforementioned outside parties by notifying us by telephone, mail, fax, email or in person.

We take our responsibility to protect the privacy of our current and former clients and their information very seriously. In addition to this privacy policy, we maintain physical, electronic, procedural and other safeguards in order to protect all client information from unauthorized access, as well as to detect and respond to security breaches. Should a breach occur, our policy is to notify affected individuals when required within 30 days of discovery.

If you have any questions about our practices, or more specifically about our privacy policy, please contact us at (402) 513-0555 and we will be happy to give you additional details.



Attestation of Receipt and Delivery of ADV Part 2A&B, ADV Part 3, Privacy Policy

I, _____, as a client of Quantum Financial Partners, LLC, (CRD #138112), hereby confirm that I have received a copy of the firm's ADV Part 2A&B, ADV Part 3 Brochures and Privacy Policy, at the time of, or before my account opening. The ADV Part 2 A&B, ADV Part 3 Brochures and Privacy Policy were received by me:

_____ In person

_____ Via DocuSign

_____ Via e-mail

I, _____, as an Advisor of Quantum Financial Partners, LLC, (CRD# _____), hereby confirm that I have delivered a copy of the firm's The ADV Part 2 A&B, ADV Part 3 Brochures and Privacy Policy, at the time of, or before the account opening for _____. The The ADV Part 2 A&B, ADV Part 3 Brochures and Privacy Policy were delivered by me:

_____ In person

_____ Via DocuSign

_____ Via e-mail

_____	_____	_____	_____
Client Signature	Date	Client Signature	Date

_____	_____	_____	_____
Advisor Signature	Date	CCO / Managing Partner	Date

Quantum Financial Partners, LLC is a Registered Investment Advisor (RIA)
All investments are offered and held through Charles Schwab

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