

Form ADV Part 2B – Investment Adviser Brochure Supplement

Mueller Financial Solutions Co.

Form ADV Part 2B

Investment Adviser Brochure Supplement

303 North 7th Street
Canon City, CO 81212
(719) 275-1651
www.themuellercompanies.com

Jeffrey L. Mueller
Shad E. Johnson

March 2024

This Brochure Supplement provides information about the Mueller Financial Solutions Co. (“Mueller,” or the “Firm,” “we,” “us,” “our”) employees that supplements our Brochure. You should have received a copy of that Brochure. Please contact Jeffrey L. Mueller, President, Chief Executive Officer and Chief Compliance Officer, at (719) 275-1651 or jeff@themuellercompanies.com if you did not receive our Brochure or if you have any questions about the contents of this Supplement.

Additional information about our employee(s) referenced above is also available on the SEC’s website at www.adviserinfo.sec.gov. You may search this site using a unique identifying number, known as a CRD number for each employee.

Item 2: Educational Background and Business Experience

Education and Business Background

Mueller requires that each investment adviser representative have a college degree, industry certifications or equivalent related business experience.

Supervised Persons

Jeffrey L. Mueller

Born 1951

CRD #: 4421457

Business Background:

Mueller Financial Solutions Co. 1997 to Present
President, Chief Executive Officer and Chief Compliance Officer

Mueller & Associates, P. C. 1997 to Present
President and Chief Executive Officer

Formal Education after High School:

University of Southern Colorado
Bachelor of Science in Accounting

Professional Designations:

Certified Public Accountant / Personal Financial Specialist (CPA/PFS)

Shad E. Johnson

Born 1967

CRD #: 2471965

Business Background:

Mueller Financial Solutions Co. 2013 to Present
Investment Adviser Representative

Fintegra, LLC 2009 to 2013
Representative

Sunflower Bank Trust Department. 2006 to 2013
Trust Officer

Formal Education after High School:

Eastern New Mexico University
Bachelor of Science in Communications

Professional Designations:

N/A

Professional Certifications

Our Supervised Persons maintain professional designations, which required the following minimum requirements:

Certified Public Accountant (CPA)

Issued By	State Boards of Accountancy
Prerequisites	<p>Candidate must meet the following requirements:</p> <ul style="list-style-type: none">• Minimum experience levels (most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA);• Successful passing of the Uniform CPA Examination
Education Requirements	At minimum, a college education (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting)
Exam Type	Uniform CPA Examination
Continuing Education Requirements	Completion of 40 hours of continuing professional education each year (or 80 hours over a two-year period) in order to maintain a CPA license

Personal Financial Specialist (PFS)

Issued By	American Institute of Certified Public Accountants (AICPA)
Prerequisites	<p>Candidate must meet the following requirements:</p> <ul style="list-style-type: none">• Must hold an unrevoked CPA license;• Fulfill 3,000 hours of personal financial planning business experience;• Complete 80 hours of personal financial planning continuing professional education credits;• Pass a comprehensive financial planning exam (PFS Exam); and• Be an active member of the AICPA
Education Requirements	Must meet minimum education requirements for CPA.
Exam Type	PFS Exam
Continuing Education Requirements	Completion of 60 hours of financial planning continuing professional education credits every three years

Item 3: Disciplinary Information

Neither Mueller nor any Supervised Persons have been involved in any activities resulting in a disciplinary disclosure.

Item 4: Other Business Activities

As disclosed in Form ADV Part 2A Item 10 – Other Financial Industry Activities and Affiliations, Jeffrey L. Mueller is President of Mueller & Associates, PC, a certified public accounting firm providing traditional tax and accounting services.

Jeffrey L. Mueller is a member of two Real Estate Investment Liability Companies or Limited Partnerships. These entities represent personal investments with clients. The entities invest in local commercial or residential rental properties.

Item 5: Additional Compensation

No Supervised Person receives any economic benefit outside of regular salaries or bonuses related to amount of sales, client referrals or new accounts.

Item 6: Supervision

Jeffrey L. Mueller, President, Chief Executive Officer and Chief Compliance Officer, is responsible for supervising Mueller's advisory activities and managing Mueller's team of supervised persons.

Jeffrey L. Mueller supervises these persons by holding regular meetings, which may include staff, investment, compliance and other ad hoc meetings. Jeffrey L. Mueller reviews client reports, emails and trading, as well as personal securities transactions and holdings reports.

Jeffrey L. Mueller may be reached at (719) 275-1651.