

# 11 Financial Form ADV Part 2B Individual Disclosure Brochure

for

Joseph Ceasar

Personal CRD Number: 4710017

Investment Adviser Representative

This brochure supplement provides information about Joseph Ceasar that supplements the 11 Financial brochure. You should have received a copy of that brochure. Please contact us at (936) 899-5629 or by email at: Info@choose11.com if you did not receive 11 Financial's brochure or if you have any questions about the contents of this supplement.

Additional information about Joseph Ceasar is also available on the SEC's website at www.adviserinfo.sec.gov.

UPDATED: 03/29/2024

# Item 2: Educational Background and Business Experience

Name: Joseph Ceasar Born: 1979

### **Educational Background and Professional Designations:**

#### **Education:**

- MBA - 2010

University of Houston – Houston, TX

Bachelor of Science - 2001 US Military Academy- West Point, New York

#### **Business Background:**

- 11/2022 Present Investment Adviser Representative
  - 11 Financial
- 09/2014 Present Executive Director
  - Legacy Institute for Financial Management
- 06/2015 02/2021 Portfolio Manager

Semita Asset Management

## **Item 3: Disciplinary Information**

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

#### **Item 4: Other Business Activities**

Joseph Ceasar is the Executive Director of Legacy Institute for Financial Education and spends approximately 80% of his time on that outside activity.

## **Item 5: Additional Compensation**

Joseph Ceasar does not receive compensation or other economic benefit from anyone who is not a client for providing advisory services.

## **Item 6: Supervision**

Taylor Kovar, Chief Compliance Officer, monitors the investment advisory activities, personal investing activities, and adherence to the Advisor's compliance program and code of ethics of the 11 Financial supervised persons on a continuous basis using various methods, including periodic inspection and review of client securities positions and transaction activity, obtaining certifications of compliance with company policies and procedures from those supervised, and obtaining and reviewing brokerage statements or transactions and holdings reports of the supervised persons. Taylor Kovar can be reached at (936) 899-5629.