

# **Form ADV Part 2B Brochure Supplement**

**Christopher A. Helmick**

**Converse Team Financial Services, LLC**

160 N County Line Rd.

Wichita, KS 67230

Phone: 316-600-4015

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This Brochure Supplement provides information about Christopher A. Helmick that supplements the Converse Team Financial Services, LLC Brochure which you should have received. Please contact us at 316-600-4015 if you did not receive the Brochure or if you have any questions about it or the contents of this supplement.

Additional information about Mr. Helmick is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2- Educational Background and Business Experience**

**Christopher A. Helmick (born 1989)**

### **Educational Background:**

- Butler Community College, Attended 2009 – 2014

### **Business Experience:**

- Converse Team Financial Services, LLC – Investment Adviser Representative, 01/2025 - present
- Converse Financial Advisory, Inc. - Independent Contractor, 09/2023 to present
- Raymond James Financial Services, Inc. - Registered Representative, 09/2023 to present
- Raymond James Financial Services Advisors, Inc. - Investment Advisor Representative, 09/2023 to present
- Keating & Associates, Inc. - Associate/Employee, 09/2023 to 04/2025
- Custom Alluring Homes, LLC - Owner, 10/2022 to 08/2023
- Wells Fargo Clearing Services, LLC - Registered Representative, 07/2022 to 01/2023
- Merrill Lynch, Pierce, Fenner & Smith Incorporated - Financial Advisor Trainee – FADP, 08/2018 to 07/2022

## **Item 3- Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding certain legal or disciplinary events that would be material to the evaluation of the firm or the integrity of its management. Mr. Helmick is currently not subject to, nor has ever been subject to, any legal or disciplinary events of this nature.

#### **Item 4- Other Business Activities**

Mr. Helmick is a registered representative of Raymond James Financial Services, Inc., a securities broker-dealer, member SIPC, and member of the Financial Industry Regulatory Authority, Inc. (FINRA). Mr. Helmick is also an Investment Adviser Representative of Raymond James Financial Services Advisors, Inc., ("RJFSA"), a federally registered investment adviser. When appropriate, Mr. Helmick may recommend that you use the investment advisory services of RJFSA. If you utilize the advisory services of Mr. Helmick through RJFSA, he may receive additional fees or other compensation in his capacity as an investment adviser representative. These fees would be in addition to any fees charged for the advisory services provided through Converse Team Financial Services, LLC.

In his separate capacity as a registered representative, he will be able to effect securities transactions and will receive separate customary compensation for effecting any securities transactions. He is also insurance licensed and may separately offer clients advice or recommendations related to insurance products, and some of which will generate standard and customary insurance commissions and other compensation.

While CTFS 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 conflict of interest and may affect the judgment of individuals who make recommendations. We believe however that our recommendations are in the best interests of our clients and are consistent with our clients' needs. Our clients are under no obligation to purchase products or services recommended by our associated persons or to purchase products or services through our associated persons and we recommend that they review investment and insurance options with their attorney, accountant, or other applicable professional.

Mr. Helmick has no other material business activities to report.

#### **Item 5- Additional Compensation**

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

#### **Item 6 - Supervision**

Mr. Helmick reports to Mr. Michael Converse, the firm's CEO. Mr. Brandon Converse, the firm's Chief Compliance Officer, is responsible for the firm's regulatory compliance program.

Either Mr. Michael Converse or Mr. Brandon Converse can be contacted at the number above regarding the activities of Mr. Helmick.