

# **Forrest J. Means**

## **FIRM SUPPLEMENTAL BROCHURE (ADV PART 2B)**

**JULY 11, 2022**

### ***Cross State Financial Group, LLC***

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This Brochure Supplement provides information about Forrest J. Means that supplements the Cross State Financial Group, LLC's Brochure. You should have received a copy of that Brochure. Please contact Mr. Means at (800) 621-6974 if you did not receive Cross State Financial Group, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Forrest J. Means is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as a CRD number. The CRD number for Mr. Means is 7260310.

## ITEM 2 – EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

**FORREST J. MEANS**

**Born:** 1983

**Education:**

*University of Phoenix* – Bachelor of Science in Business Management – 2016

**Business Background:**

*Cross State Financial Group, LLC* – July 2022 to Present  
– Investment Adviser Representative

*Financial Depot* – May 2020 to Present  
– Investment Adviser Representative

*Nor Cal Emergency Medical Training* – May 2020 to Present  
– Instructor

*NCTI/AMR* – January 2004 to July 2012  
– Instructor

## ITEM 3 – DISCIPLINARY HISTORY

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would-be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

## ITEM 4 – OTHER BUSINESS ACTIVITIES

Mr. Means is an owner and investment adviser representative of the Financial Depot, a state-registered investment adviser. Although this is considered investment related, there are no conflicts of interest associated with this activity as he does not recommend advisory services for a fee to the firm's clients through the Financial Depot. He devotes approximately 25% of his time to this activity.

Mr. Means is an instructor for Nor Cal Emergency Medical Training. He devotes approximately 20% of his time on this non-investment related activity.

## ITEM 5 – ADDITIONAL COMPENSATION

Mr. Means does not receive any additional compensation.

## ITEM 6 – SUPERVISION

Mr. Means is overseen by the Adviser's Chief Compliance Officer, Danielle E. Mutz. Ms. Mutz reviews all new accounts opened by Mr. Means. Ms. Mutz can be reached at (800) 621-6974.