

**Item 1: Cover Page**

*This brochure supplement provides information about Edward James Thiessen that supplements the Global View Capital Management, LLC brochure. You should have received a copy of that brochure. Please contact Edward James Thiessen if you did not receive Global View Capital Management, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Edward James Thiessen is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

**Global View Capital Management, LLC**  
Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Edward James Thiessen, CFP**

Personal CRD Number: 1160071

Investment Adviser Representative

ed@swfinancial.com

*Headquarters Address*

Global View Capital Management, LLC  
N14 W23833 Stone Ridge Drive, Suite 350  
Waukesha, WI 53188-1126  
(262) 650-1030

## Item 2: Educational Background and Business Experience

**Name:** Edward James Thiessen

**Born:** 1957

### Education:

Certified Financial Planner, Certified Financial Planner Board of Standards, Inc. -  
Denver, CO - 03/1990

Chartered Advisor in Philanthropy Designation – The American College of  
Financial Services – 08/2023

### Designations:

#### CERTIFIED FINANCIAL PLANNER™ professional

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board’s other certification marks (the “CFP Board Certification Marks”). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.CFP.net](http://www.CFP.net).

CFP® professionals have met CFP Board’s high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor’s degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirements through other qualifying credentials. CFP Board implemented the bachelor’s degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor’s or higher degree or completed a financial planning development capstone course.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual’s ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board’s Code of Ethics and Standards of Conduct (“Code and Standards”), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board’s Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

### **Business Background:**

09/2023 - Present	Investment Adviser Representative Global View Capital Management, LLC
08/2023 - Present	Independent Contractor Global View Capital Advisors, LLC
05/1990 – Present	Sales Representative for Insurance and Advisory Services and Owner Southwest Financial Advisory Group, Inc.
12/1998 – Present	Insurance Agent and President Southwest Financial Concepts, Inc.
11/2012 – 09/2023	Registered Representative and Investment Adviser Representative OneAmerica Securities
08/2012 – 03/2016	General Agent American United Life

### **Item 3: Disciplinary Information**

Investment Adviser Representatives (“IARs”) are required to disclose material facts regarding any legal or disciplinary events. Edward James Thiessen has not been the subject of any legal or disciplinary events initiated by a governmental entity or regulatory body. For additional details see [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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

Global View Capital Advisors, LLC (“GVCA”), is an affiliated company of Global View Capital Management, LLC (“GVCM”). This is not a conflict of interest.

Edward James Thiessen is a Sales Representative for insurance services with Southwest Financial Advisory Group, Inc. From time to time, the individual will offer clients advice or products from this activity. In such a capacity, the Agent may offer insurance products and receive normal and customary fully-disclosed commissions. Clients are in no way required to utilize the services of any representative of Global View Capital Management, LLC in such individual's outside capacity. This may pose a conflict of interest.

### **Item 5: Additional Compensation**

Edward James Thiessen receives no economic benefit in the form of additional compensation for providing advisory services, such as sales awards, prizes or bonus payments outside of salary, commission and/or bonus received from GVCM or GVCA or as disclosed as an Other Business Activities as described directly above.

### **Item 6: Supervision**

As an Investment Adviser Representative of GVCM, Edward James Thiessen is required to adhere to GVCM's Compliance Policies & Procedures and Code of Ethics. The personal trading and any other activities are reviewed by GVCM's Compliance Officer, Dina L. Fliss. Ms. Fliss can be reached at (262) 650-1030 and by email at [compliance@gvcaponline.com](mailto:compliance@gvcaponline.com).