

**Makenna K Rasmussen**

**Journey Retirement Planning and Investment Management, LLC**

**3040 E 17th Street  
Suite 2  
Ammon, ID 83406**

**Telephone: 208-552-9169**

**August 22, 2025**

**FORM ADV PART 2B  
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Makenna K Rasmussen that supplements the Journey Retirement Planning and Investment Management, LLC brochure. You should have received a copy of that brochure. Contact us at 208-552-9169 if you did not receive Journey Retirement Planning and Investment Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Makenna K Rasmussen (CRD # 8148424) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2 Educational Background and Business Experience

### **Makenna K Rasmussen**

*Year of Birth:* 2001

*Formal Education After High School:*

- Utah Valley University, BA Personal Financial Planning, 8/2020 - 5/2024
- Utah Valley University, AA Business Management, 8/2020 - 5/2022

*Business Background:*

- Journey Retirement Planning and Investment Management, LLC, Investment Advisor Representative, 8/2025 - Present
- Journey Retirement Planning and Investment Management, LLC, Receptionist, 7/2024 - 8/2025
- Capita Financial Network, Operations Assistant & Financial Representative, 1/2023 - 5/2025
- Clark Rasmussen Taylor Accounting, Accounting Administrator, 9/2022 - 1/2023
- America First Credit Union, Teller, 1/2022 - 8/2022
- North Star Security, Customer Care Supervisor, 8/2020 - 1/2022

## Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Ms. Makenna K Rasmussen has no required disclosures under this item.

## Item 4 Other Business Activities

Makenna K Rasmussen is not actively engaged in any other business or occupation (investment-related or otherwise) beyond her capacity as an Investment Advisor Representative of Journey Retirement Planning and Investment Management, LLC. Moreover, Ms. Rasmussen does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

## Item 5 Additional Compensation

Makenna K Rasmussen does not receive any additional compensation beyond that received as an Investment Advisor Representative of Journey Retirement Planning and Investment Management, LLC.

## Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Journey Retirement Planning and Investment Management, LLC, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Jennifer Landon, President

Supervisor phone number: 208-552-9169