

**Item 1: Cover Page for Part 2B of Form ADV:
Brochure Supplement
August 2022**

Gregory Charles O'Donnell

**O'Donnell Financial Services, LLC
1101 Fifth Avenue Suite 150
San Rafael, CA 94901**

**Firm Contact:
Kim Kaselionis
Chief Compliance Officer**

This brochure supplement provides information about Mr. O'Donnell that supplements our brochure. You should have received a copy of that brochure. Please contact Ms. Kaselionis if you did not receive O'Donnell Financial Services LLC' brochure or if you have any questions about the contents of this supplement.

Additional information about Mr. O'Donnell is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD# 2802185

Item 2: Educational Background & Business Experience

Gregory Charles O'Donnell

Year of Birth: 1963

Educational Background:

- 1998: University of California, Berkeley Extension

Business Background:

- 02/2015 – Present O'Donnell Financial Service, LLC; Managing Member & Investment Advisor
- 09/2016 – Present Independent Financial Group, LLC (CRD# 7717) (dba O'Donnell Financial Group); Registered Representative
- 01/2017 – Present Independent Financial Group, LLC (CRD# 7717) Investment Adviser Representative
- 03/2004 – Present Real Estate Broker (dba O'Donnell Financial Group)
- 10/1996 – Present Insurance Broker (dba O'Donnell Financial Group) Life & Health Licenses
- 05/2013 – 09/2016 Securities America Advisors, Inc. (CRD# 10205) (dba O'Donnell Financial Group); Registered Representative
- 05/2009 – 05/2013 Financial Telesis Inc. (CRD 31012) Registered Principal (dba O'Donnell Financial Group):
- 05/2008 – 05/2009 Liberty Group, LLC (CRD # 23131) Registered Principal (dba O'Donnell Financial Group):
- 12/1997 – 05/2008 Royal Alliance Associates (CRD # 23131) Registered Principal (dba O'Donnell Financial Group)
- 10/1996 – 01/1998 WMA Securities (CRD # 32625) Registered Principal (dba O'Donnell Financial Group)
- 03/1987 – 03/2004 Real Estate Salesperson (dba Gregory C. O'Donnell)

Exams, Licenses & Other Professional Designations:

- 2004: Real Estate Broker
- 1999: Series 7 & 65 Exams
- 1998: Insurance Producer
- 1996: Series 26 Exam
- 1995: Series 6 & 63 Exams
- 1987: Real Estate Salesperson

Item 3: Disciplinary Information¹

There are no legal or disciplinary events that are material to the evaluation of Mr. O'Donnell.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving the advisor to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of advisor to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Item 4: Other Business Activities

Mr. O'Donnell is a registered representative of Independent Financial Group, LLC, member FINRA/SIPC. He may offer securities and receive normal and customary commissions as a result of securities transactions. A conflict of interest may arise as these commissionable securities sales may create an incentive to recommend products based on the compensation Mr. O'Donnell may earn.

Mr. O'Donnell is a licensed insurance agent. He may offer insurance products and receive normal and customary fees as a result of insurance sales. A conflict of interest may arise as these insurance sales may create an incentive to recommend products based on the compensation, he and/or our supervised persons may earn.

Mr. O'Donnell is a licensed real estate agent and licensed mortgage loan advisor. As such, he may receive normal and customary fees associated with real estate transactions in their independent capacities. These services are separate from O'Donnell Financial Services' advisory services and are governed under a separate agreement. Clients are under no obligation to engage us for these and will not be actively solicited.

Mr. O'Donnell is the CEO of O'Donnell Financial Group, Inc., He spends 15% of his time in this capacity.

Item 5: Additional Compensation

Mr. O'Donnell may have an incentive to join or remain with Independent Financial Group, LLC. through bonuses, enhanced pay-outs, forgivable loans, business transition loans and other forms of cash and non/cash compensation for meeting certain production levels. In addition, Mr. O'Donnell may receive bonuses or non-cash compensation relating to the promotion of a program sponsor's products or services. These sponsors may pay for training, education or prospecting events such as seminars, due diligence and travel expenses to these events and occasionally provide business entertainment or gifts of nominal value. Mr. O'Donnell may also receive referral fees for referring a client or prospective client to a third-party investment advisor.

Item 6: Supervision

Kim Kaselionis, Chief Compliance Officer of O'Donnell Financial Services, supervises and monitors Mr. O'Donnell's activities on a regular basis to ensure compliance with our firm's Code of Ethics. Please contact Ms. Kaselionis if you have any questions about Mr. O'Donnell's brochure supplement at (415) 758-6335.