

**Jeffrey T. Lester  
Eide Bailly Advisors, LLC  
810 S. Cincinnati Ave, Ste 600  
Tulsa, OK 74119  
Phone: 918-748-5002**

**08/01/2023**

**Form ADV Part 2B  
Brochure Supplement**

**This brochure supplement provides information about Jeffrey T Lester that supplements the Eide Bailly Advisors, LLC Brochure. You should have received a copy of that brochure. Please contact Jill Floden at (701) 239-8560 or (866) 740-4100 if you did not receive the Eide Bailly Advisors, LLC brochure or if you have any questions about the contents of this supplement.**

**Additional information about these individuals is available on the SEC's website [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)**

**Name:** Jeffrey T Lester

**Year of Birth:** 1961

**Educational Background:** University of Oklahoma, Bachelor of Arts, Journalism, 1983

**Professional Designations:**

- Professional Plan Consultant® (PPC®). The PPC is a professional designation earned through the study and testing of ERISA requirements. A professional who has received this designation has studied coursework regarding the retirement plan framework and plan management such as fiduciary roles and responsibilities, investment selection and monitoring, service provider, due diligence, plan administration, participant education and how to implement plan changes. Annual continuing education is required to maintain this designation.

**Business Background and Affiliations:**

- Eide Bailly Wealth, marketing name only, Retirement Plan Advisor, 08/23-present
- Eide Bailly Advisors, LLC: Investment Advisory Representative, 10/08-present
- Eide Bailly Agency, LLC: Insurance Agent, 10/08-present
- Eide Bailly Financial Services, LLC: holding company, no title, 8/08-present
- United Planners Financial Services of America: Registered Representative, 10/15-07/23
- Securities America, Inc: Registered Representative, 10/08-09/15

**Disciplinary Information:**

Jeffrey T. Lester has no disciplinary history required to be disclosed by the U.S. Securities and Exchange Commission or state regulatory authorities.

**Other Business Activities:**

Jeffrey is also licensed as an insurance agent. He recommends insurance services or products to clients through Eide Bailly Agency, LLC or other insurance companies for commissions. This is a conflict of interest, since commissions earned could be in addition to advisory fees. Clients are never obligated to purchase insurance products through Jeffrey or Eide Bailly Agency, LLC, and may select any independent insurance agent/company to purchase insurance products. Regardless of the agent/company chosen, they will receive commissions from the sale.

Jeffrey spends to majority of his workweek providing retirement plan consulting and asset management services to clients. A small amount of time is also spent volunteering in the community outside of normal securities trading hours.

**Additional Compensation:**

Jeffrey does not receive any additional economic benefits or compensation such as, but not limited to, sales awards, other prizes and from any other source outside of Eide Bailly Advisors, LLC., wholly owned and operated by Eide Bailly LLP.

**Supervision:**

Jill Floden is the Chief Compliance Officer responsible for developing, monitoring and enforcing the firm's compliance and supervision program at Eide Bailly Advisors, LLC. Jill can be contacted at (701) 239-8560 or (866) 740-4100.