



PART 2B OF FORM ADV: BROCHURE SUPPLEMENT

Danielle J. Ives

Formation Financial
780 Newtown Yardley Road,
Suite 310
Newtown, PA 18940
(267) 433-0521 (P)

danielleives@formationfinancial.net
www.formationfinancial.net

Great Valley Advisor Group, Inc.
1200 Pennsylvania Avenue
Wilmington, DE 19806

(302) 483-7200

www.greatvalleyadvisors.com

April 15, 2025

This Brochure Supplement provides information about Danielle J. Ives (CRD# 3233670) that supplements the Great Valley Advisor Group, Inc. ("GVA") Brochure. You should have received a copy of that Brochure. Please contact the GVA office at 302-483-7200 if you have not received GVA's Brochure or if you have any questions about the contents of this supplement.

Additional information regarding Danielle J. Ives pertaining to any disciplinary actions or outside business activities, if applicable, is available on the SEC's website at www.adviserinfo.sec.gov or the FINRA Broker Check website, www.finra.org/brokercheck.

ITEM 2 - EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

DOB: March 22, 1975

Education:

Villanova – Elementary Education Graduated 1997

FINRA exams successfully passed:

- Series 6 Investment Company Products/Variable Contracts Representative
- Series 7 General Securities Representative
- Series 63 Uniform Securities Agent State Law
- Series 65 Uniform Investment Adviser Law

Insurance Licenses: Life, Health, Variable Annuities

Business Experience:

Great Valley Advisor Group, Inc.

Investment Advisory Services, Asset Management and Financial Planning

3/2015 – Present

LPL Financial LLC

Registered Representative

3/2015 – Present

Formation Financial

Investment Adviser

9/2021 - Present

Wells Fargo Advisors, LLC

Financial Advisor

9/2000 – 3/2015

ITEM 3 – DISCIPLINARY INFORMATION

We must disclose any legal or disciplinary event that would be material to you when evaluating Ms. Ives. We have no such legal or disciplinary history to report to you

ITEM 4 - OTHER BUSINESS ACTIVITIES

Ms. Ives is a registered representative of LPL Financial ("LPL"), a full-service broker-dealer, member FINRA/SIPC, which compensates him for effecting securities transactions.

As a broker-dealer, LPL engages in a broad range of activities normally associated with securities brokerage firms. Pursuant to the investment advice given by Ms. Ives investments in securities may be recommended for you. If LPL is selected as the broker-dealer, it may effect transactions in securities for you, a client of GVA and Ms. Ives. By serving as the broker-dealer, LPL and Ms. Ives may receive commissions for executing securities transactions. When Ms. Ives receives commissions in connection with the

advice given to advisory clients, GVA may reduce a portion of its fees by the amount of the commissions earned by Ms. Ives.

You are advised that if LPL is selected as the broker-dealer, the transaction charges may be higher or lower than the charges you may pay if the transactions were executed at other broker-dealers. You should note, however, that you are under no obligation to purchase securities through Ms. Ives, GVA or LPL.

Ms. Ives may in her capacity as registered representative of LPL, or as agent appointed with various life, disability or other insurance companies, receive commissions, 12(b)-1 fees, trails, or other compensation from the respective product sponsors and/or as a result of effecting securities transactions for you. As previously noted, when commissions or fees are received by Ms. Ives in connection with the advice given to you, she may, but is not obligated to, reduce its fee proportionate to the amount of the commission or fee earned by her.

Ms. Ives holds an insurance license to sell limited insurance products. It is anticipated that 50% of her time will be spent providing these insurance products. She may receive compensation from selling insurance products and therefore receive economic benefit for this activity. This will create a conflict of interest with clients.

ITEM 5 - ADDITIONAL COMPENSATION

The above business associations do not provide any additional compensation other than as described in the GVA's Form ADV 2A.

ITEM 6 - SUPERVISION

Ms. Danielle Ives is supervised through a compliance program designed to prevent and detect violations of the federal and state securities laws. Supervision is conducted by the Branch Manager, Therese O'Connell, who is responsible for administering the policies and procedures. Mr. Todd reviews those policies and procedures annually for their adequacy and the effectiveness of their implementation. All policies and procedures of the firm are followed.

Therese O'Connell's contact information:

Branch Manager

(302) 483-7200

toconnell@formationfinancial.net