



Casey J. Nelson
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November 3rd, 2025

This Brochure Supplement provides information about Casey J. Nelson that supplements the Integrity Alliance, LLC Brochure. You should have received a copy of that Brochure. Please contact Advisor Services at 877-886-1939 if you did not receive Integrity Alliance, LLC Brochure or if you have any questions about the contents of this supplement.

Additional information about Casey J. Nelson is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background and Business Experience

Born: North Dakota

Formal Education after High School

- Some College

Relevant Work History

- Calibrate Wealth Partners – Registered Rep (12/2022 – Present)
- Integrity Alliance – Registered Rep/Investment Advisor (11/2025 - Present)
- Lion Street Financial – Registered Rep (02/19 – 11/2025)
- Lion Street Advisors – Investment Advisor (04/25 – 11/2025)
- E4 Brokerage LLC – Insurance Agent (03/21 - Present)
- Ameritas Investment Company – Registered Rep (06/17 – 02/19)
- CCF Investment Company – Registered Rep (08/14 – 06/17)

Professional Licenses/Designations

Series 6- Investment Company/Variable Contracts Products Limited Representative Qualification Exam

To obtain the Series 6, an initial qualifying exam administered by the Financial Industry Regulatory Authority ("FINRA") must be passed. Continuing Education requirements include attending an Annual Compliance Meeting and Firm Element Training. FINRA also requires annual computer-based continuing education.

Series 63 - Uniform Securities Agent State Law Examination

To obtain the Series Combined 63 and 65, an initial qualifying exam administered by the Financial Industry Regulatory Authority ("FINRA") must be passed. Continuing Education requirements include attending an Annual Compliance Meeting and Firm Element Training. NASAA has implemented annual computer-based continuing education in the states that have adopted this rule.

Series 65 - Uniform Investment Adviser Law Examination

To obtain the Series Combined 63 and 65, an initial qualifying exam administered by the Financial Industry Regulatory Authority ("FINRA") must be passed. Continuing Education requirements include attending an Annual Compliance Meeting and Firm Element Training. NASAA has implemented annual computer-based continuing education in the states that have adopted this rule.

Item 3: Disciplinary Information

Casey J. Nelson has no disciplinary history, the details of which can be found on SEC's Investment Advisor Public Disclosure (IAPD) website at www.advisorinfo.sec.gov or FINRA's Broker Check database at www.finra.org/brokercheck.

Item 4: Other Business Activities

The IAR is engaged in the following non-investment-related business activities:

E4 Brokerage, LLC – Provides Life Insurance products.

Nelson Holdings, LLC – Holding company for tax benefits and protection of assets.

Calibrate Wealth Partners – I provide life insurance, annuity, and mutual fund products using the Calibrate Wealth Partners name.

Item 5: Additional Compensation

Casey J. Nelson may receive cash and non-cash compensation from certain third-party product sponsors as permitted by industry rules. For example, product sponsors and other companies may reimburse IAR up to 100% of the cost of due diligence, training, and education/joint marketing meetings. In addition, sales by IARs may qualify them for additional compensation, including support for their business activities, attendance at seminars, and entertainment.

Casey J. Nelson will also receive compensation from third-party investment advisors for referring client accounts to the third party for account management. The third-party will pay the IAR a solicitation fee for the referral. The IAR may also serve as the registered representative of record on the assets managed by the third-party investment advisor. When this is the case, the IAR will receive normal and customary compensation (e.g., commissions, 12b-1 fees, trails) for the purchase of the investments. This compensation is in addition to the referral fee paid by the third-party advisor.

Casey J. Nelson has a financial industry affiliated business as an insurance agent. These practices represent conflicts of interest because it gives the IAR an incentive to recommend products based on the commission amount received. This conflict is mitigated by disclosures, procedures, and the firm's Fiduciary obligation to place the client's interest first, and clients are not required to purchase any products. Clients have the option to purchase these products through another insurance agent of their choosing.

Item 6: Supervision

We have adopted a system of compliance and supervision we believe is reasonably designed to oversee the activities of our Advisors in accordance with applicable law. We assign supervisors to oversee the activities of our Advisors conducted through our company. The designated

supervisor of an Advisor may vary from time to time. If you have any questions or concerns, please contact our Compliance department at 877-886-1939.