



Part 2B of Form ADV: *Brochure Supplement*

Elisabeth M. Mesquit

(503) 433-7946

Soaring Investment Management, LLC

9600 SW Barnes Rd  
Ste 190  
Portland, OR 97225

This brochure supplement provides information about Elisabeth M. Mesquit that supplements the Soaring Investment Management, LLC brochure. You should have received a copy of that brochure. Please contact Elisabeth at Mesquit 503-433-7946 if you did not receive Soaring Investment Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Elisabeth M. Mesquit is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as the CRD number. The CRD number for Elisabeth M. Mesquit is 2258483.

## Item 2 Educational Background and Business Experience

**Full Legal Name:** Elisabeth M. Mesquit      **Born:** 1970

### Education

Oklahoma Christian University; Bachelor of Science, Finance; 1993

### Business Experience

- Soaring Investment Management, LLC; Sole Member, President, Chief Compliance Officer; from August 2019 to Present
- SCF Investment Advisors, Inc.; Investment Adviser Representative; from September 2015 to August 2019
- SCF Securities, Inc.; Registered Representative; from September 2015 to August 2019
- Homemaker; from November 2001 to August 2015
- Gap, Inc.; Sr. Financial Analyst International Treasury; from June 2000 to November 2001
- MidFirst Bank; Assistant Vice President of Asset/Liability Management; from June 1993 to June 2000

### Designations

Elisabeth M. Mesquit has earned the following designation(s) and is in good standing with the granting authority:

- Chartered Financial Analyst®; CFA Institute 1998

*This designation is offered by the CFA Institute (formerly the Association for Investment Management and Research [AIMR]). To obtain the CFA® charter, candidates must successfully complete three exams and gain at least three (3) years of qualifying work experience, among other requirements. In passing these exams, candidates demonstrate their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.*

- Certified Financial Planner; CFP® 2022

*This certification is the standard of excellence in financial planning, bestowed by the CFP Board. CFP® professionals meet rigorous education, training and ethical standards, and are committed to serving their clients' best interests today to prepare them for a more secure tomorrow.*

- Chartered Financial Consultant (ChFC) 2023

*This designation is issued by The American College and is granted to individuals who have at least three years of full-time business experience within the five years preceding the awarding of the designation. The candidate is required to take seven mandatory courses which include the following disciplines: financial, insurance, retirement and estate planning; income taxation, investments and application of financial planning; as well as two elective courses involving the application of the aforementioned disciplines. Each course has a final proctored exam and once issued, the individual is required to submit 30 hours of continuing education every two years.*

### **Item 3 Disciplinary Information**

Elisabeth M. Mesquit has no reportable disciplinary history.

### **Item 4 Other Business Activities**

#### **A. Investment-Related Activities**

- Elisabeth M. Mesquit is not engaged in any other investment-related activities.
- Elisabeth M. Mesquit does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

#### **B. Non Investment-Related Activities**

Elisabeth M. Mesquit is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his or her time.

## **Item 5 Additional Compensation**

Elisabeth M. Mesquit does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## **Item 6 Supervision**

As President and Chief Compliance Officer, Elisabeth M. Mesquit is responsible for the supervision and monitoring of all investment advice offered to advisory clients of Soaring Investment Management, LLC. She can be reached at 503-433-7946. Elisabeth Mesquit will oversee all material investment policy changes and conduct periodic testing to ensure the client objectives and mandates are being met.

## **Item 7 Requirements for State-Registered Advisers**

### **A. Additional Disciplinary History**

Elisabeth M. Mesquit has no additional reportable disciplinary history.

### **B. Bankruptcy History**

Elisabeth M. Mesquit has not been the subject of a bankruptcy petition.



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Eric G. Imley

(503) 433-7946

Soaring Investment Management, LLC

9600 SW Barnes Rd  
Ste 190  
Portland, OR 97225

This brochure supplement provides information about Eric G. Imley that supplements the Soaring Investment Management, LLC brochure. You should have received a copy of that brochure. Please contact Elisabeth Mesquit at 503-433-7946 if you did not receive Soaring Investment Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Eric G. Imley is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov). You can search this site by a unique identifying number, known as the CRD number. The CRD number for Eric G. Imley is 6482154.

## Item 2 Educational Background and Business Experience

**Full Legal Name:** Eric G. Imley

**Born:** 1973

### Education

UCLA; Certificate, Financial Planning and Services; 2015

UCLA; Master of Fine Arts (MFA), Theatre/Theatre Arts Management; 1999

### Business Experience

- Soaring Investment Management, LLC; Principal, Investment Adviser Representative; from July 2025 to Present
- EWG Elevate d/b/a Protection Point Advisors; Investment Adviser Representative; from October 2018 to July 2025

### Designations

Eric G. Imley has earned the following designation(s) and is in good standing with the granting authority:

- Certified Financial Planner; CFP® 2017

*This certification is the standard of excellence in financial planning, bestowed by the CFP Board. CFP® professionals meet rigorous education, training and ethical standards, and are committed to serving their clients' best interests today to prepare them for a more secure tomorrow.*

## Item 3 Disciplinary Information

Eric G. Imley has no reportable disciplinary history.

## Item 4 Other Business Activities

### A. Investment-Related Activities

- Eric G. Imley is not engaged in any other investment-related activities.
- Eric G. Imley does not receive commissions, bonuses or other compensation on the sale of securities or other investment products.

## **B. Non Investment-Related Activities**

Eric G. Imley is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his or her time.

## **Item 5 Additional Compensation**

Eric G. Imley does not receive any economic benefit from a non-advisory client for the provision of advisory services.

## **Item 6 Supervision**

Eric G. Imley is supervised and monitored by Elisabeth M. Mesquit, Chief Compliance Officer, pursuant to Soaring Investment Management, LLC's written policies and procedures and code of ethics. Elisabeth M. Mesquit may be reached using the contact information on the cover page of this brochure supplement.

## **Item 7 Requirements for State-Registered Advisers**

### **C. Additional Disciplinary History**

Eric G. Imley has no additional reportable disciplinary history.

### **D. Bankruptcy History**

Eric G. Imley has not been the subject of a bankruptcy petition.