

**Part 2B of Form ADV: Brochure Supplement**

Elisabeth M Mesquit

503-433-7946

Soaring Investment Management, LLC  
155 NW 95th Avenue  
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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 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; Investment Advisor Representative/Owner; from August 2019 to Present.
- The Summit Financial Strategies, Inc.; Investment Advisor Representative; from July 2015 to September 2019
- SCF Securities, Inc.; Registered Representative; from September 2015 to September 2019
- SCF Investment Advisors, Inc.; Investment Advisor Representative; from September 2015 to September 2019
- 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.

## Item 3 Disciplinary Information

Elisabeth M Mesquit has no reportable disciplinary history.

## **Item 4 Other Business Activities**

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

1. Elisabeth M Mesquit is not engaged in any other investment-related activities.
2. 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 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.