

# ADV Part 2B

## Brochure Supplement

### *Schneider Downs Wealth Management Advisors, LP*

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

Email: [sdwealthmanagement@schneiderdowns.com](mailto:sdwealthmanagement@schneiderdowns.com)

Website: [www.sdwealthmanagement.com](http://www.sdwealthmanagement.com)

#### *Individuals Included in Supplement:*

Skeans, Nancy, CEO

Derek Eichelberger, Partner

Biggs, E. Matthew

Brinkman, David

Brose, Tyler

Bucci, Michael

Fodge, Shawn

Garcia, Alissa

Linzer, Don

Moyer, James

Murphy, Kelly

Napierkowski, Daniel

Papson, Alexander

Rain, Scott

Staley, Jason

Zeller, Kyle

### *Effective Date: April 29, 2021*

*The enclosed brochure supplement has not been approved by the U.S. Securities & Exchange Commission (SEC) or any state securities authority. This part of the Form ADV provides information about the advisory personnel on whom the particular client receiving the brochure relies for investment advice. The brochure supplements are to be considered along with the ADV Part 2A. If you have not received a copy of the ADV Part 2A or if you have any questions about the contents of this supplement, please contact Schneider Downs Wealth Management Advisors, LP ("SDWMA") at the phone number or email address listed above.*

*Additional information about individuals listed in this brochure supplement is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

# Nancy L. Skeans

412-697-5376

## ***Schneider Downs Wealth Management Advisors, LP***

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

## **Item 2: Educational Background and Business Experience**

Nancy L. Skeans

Born, 1962

### **Education:**

U.S. Air Force Academy, B.S.

Wright State University, M.B.A.

College For Financial Planning, M.S. Finance

### **Professional Designations\*:**

Certified Public Accountant

CERTIFIED FINANCIAL PLANNER™ Practitioner

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

CEO, 7/2017 – Present

CCO, 9/2019 - Present

Managing Director/Partner, 10/2003 – Present (Partner since 7/2009)

Schneider Downs & Co., Inc.

Shareholder, 7/2018 - Present

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

**Item 6: Supervision** - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDWMA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:

SDCo's Board of Directors

412-697-5200

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# Derek J. Eichelberger

412-697-5672

## ***Schneider Downs Wealth Management Advisors, LP***

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

## **Item 2: Educational Background and Business Experience**

Derek J. Eichelberger

Born, 1973

### **Education:**

Pennsylvania State University, B.S.

University of Pittsburgh, Katz Graduate School of Business, M.B.A.

### **Professional Designations\*:**

Chartered Financial Analyst®

CERTIFIED FINANCIAL PLANNER™ Practitioner

Accredited Investment Fiduciary Analyst™

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Partner, 7/2018 - Present

Investment Advisor / Director of Investment Strategies, 6/2015 – Present

Operations Manager, 3/2015 – 6/2015

Gibson Capital, LLC

Senior Advisor / Partner, 12/2013 – 8/2014

Senior Associate, 11/2008 - 09/2013

Associate, 3/2003 – 3/2009

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

**Item 6: Supervision** - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDWMA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:

Nancy Skeans, CEO & CCO

412-697-5376

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\* Please refer to page 17-18 of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

# E. Matthew Biggs

614-586-7123

## ***Schneider Downs Wealth Management Advisors, LP***

65 East State Street, Suite 2000

Columbus, OH 43215

614-621-4060

## **Item 2: Educational Background and Business Experience**

E. Matthew Biggs

Born, 1991

### **Education:**

The Ohio State University, B.A.

### **Professional Designations \*:**

CERTIFIED FINANCIAL PLANNER™ Practitioner

Certified Plan Fiduciary Adviser (CPFA)

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Associate Investment Advisor, 10/2018 - Present

Huntington Bank

Relationship Banker III, 6/2017 – 9/2018

Fidelity Investments

Investment Consultant, 12/2016 – 6/2017

Financial Representative, 12/2015 – 12/2016

BlueGrace Logistics

Account Executive, 7/2015 – 11/2015

Northwestern Mutual

Financial Representative, 5/2014 – 7/2015

Ohio State University

Student, 9/2012 – 12/2014

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

**Item 6: Supervision** - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDWMA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:

Nancy Skeans, CEO & CCO

412-697-5376

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# David C. Brinkman

614-586-7265

## ***Schneider Downs Wealth Management Advisors, LP***

65 East State Street, Suite 2000

Columbus, OH 43215

614-621-4060

## **Item 2: Educational Background and Business Experience**

David C. Brinkman

Born, 1982

### **Education:**

The Ohio State University, B.A.

### **Professional Designations \*:**

Certified Public Accountant

Chartered Financial Analyst®

CERTIFIED FINANCIAL PLANNER™ Practitioner

Certified Plan Fiduciary Adviser (CPFA)

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Investment Relationship Manager, 5/2016-

Present

Plante Moran Financial Advisors

Manager / Investment Advisor, 12/2014 – 3/2016

Investment Advisor, 8/2012 – 12/2014

William Blair & Company

Research Associate, 11/2011 – 5/2012

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

**Item 6: Supervision** - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDWMA uses these policies and guidelines to monitor supervised individuals.

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Nancy Skeans, CEO & CCO

412-697-5376

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# Tyler R. Brose

412-697-5609

## ***Schneider Downs Wealth Management Advisors, LP***

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

## **Item 2: Educational Background and Business Experience**

Tyler Brose

Born, 1993

### **Education:**

Pennsylvania State University, Erie, B.S.

### **Professional Designations \*:**

CERTIFIED FINANCIAL PLANNER™ Practitioner

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Associate Investment Advisor, 3/2019 – Present

Hefren Tillotson

Analyst, 2/2016 – 1/2019

Intern, 5/2015 – 12/2015

Erie Insurance

Intern, 10/2014 – 12/2014

Mine Safety Appliances

Intern, 5/2014 – 8/2014

Penn State University - Erie

Student, 9/2011 – 12/2015

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

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Nancy Skeans, CEO & CCO

412-697-5376

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# Michael J. Bucci

412-697-5329

## ***Schneider Downs Wealth Management Advisors, LP***

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

## **Item 2: Educational Background and Business Experience**

Michael J. Bucci

Born, 1981

### **Education:**

East Carolina University, B.S. / B.A.

### **Professional Designations \*:**

Certified Investment Management Analyst®

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Director of Fiduciary Services, 7/2019 -Present

Investment Advisor, 9/2009 – 7/2019

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

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Nancy Skeans, CEO & CCO

412-697-5376

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# Shawn M. Fodge

412-697-5825

## ***Schneider Downs Wealth Management Advisors, LP***

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

## **Item 2: Educational Background and Business Experience**

Shawn M. Fodge

Born, 1982

### **Education:**

Saint Vincent College, B.S.

Duquesne University – Executive Certificate in Financial Planning

### **Professional Designations \*:**

CERTIFIED FINANCIAL PLANNER™ Practitioner

Accredited Investment Fiduciary™

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Investment Relationship Manager, 3/2020-

Present

Wealth Management Associate, 1/2020 – 3/2020

The Huntington Investment Company

Relationship Manager, 08/2018 – 01/2020

LPL Financial

Registered Representative, 08/2011 – 1/2017

PNC Bank N.A.

PNCI Retire Plng Admin, 11/2009 – 8/2011

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

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Nancy Skeans, CEO & CCO

412-697-5376

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# Alissa M. Garcia

412-697-5665

## ***Schneider Downs Wealth Management Advisors, LP***

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

## **Item 2: Educational Background and Business Experience**

Alissa M. Garcia

Born, 1988

### **Education:**

University of Pittsburgh, M.P.I.A.

Geneva College, B.S.

### **Professional Designations \*:**

CERTIFIED FINANCIAL PLANNER™ Practitioner

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Investment Relationship Manager, 1/2020 –

Present

Communications Manager, 10/2019 - Present

Associate Investment Advisors – 1/2018-12-2019

Oakmont Capital Management, LLC

Portfolio Manager, 11/2016 – 1/2018

Trustmont Advisory Group, Inc. / Trustmont Financial Group, Inc.

Investment Advisor, 6/2015 – 10/2016

Registered Representative, 8/2014 – 10/2016

J.E. Harris and Associates

Office Manager, 5/2014 – 08/2014

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

**Item 6: Supervision** - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDWMA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:

Nancy Skeans, CEO & CCO

412-697-5376

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# Don A. Linzer

412-697-5222

## ***Schneider Downs Wealth Management Advisors, LP***

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

## **Item 2: Educational Background and Business Experience**

Don A. Linzer

Born, 1954

### **Education:**

University of Pittsburgh, B.A.

Nova University Center for the Study of Law, Law Review, J.D.

George Washington University National Law Center, Master of Laws - Taxation

### **Professional Designations \*:**

CERTIFIED FINANCIAL PLANNER™ Practitioner

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Investment Advisor, 7/2017 - Present

CEO, 2/2000 - 7/2017

Schneider Downs Corporate Finance, LP

CEO / Registered Principal, 1/2007 - 2019

Schneider Downs & Co., Inc.

8/1980 - Present (Shareholder since 1985)

### **Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - Schneider Downs Corporate Finance, LP (SDCF) is a registered broker/dealer, member FINRA/SIPC, established to facilitate investment banking or mergers and acquisitions projects that involve securities transactions. SDCF does not hold accounts for customers and does not receive or hold funds or securities for customers. Don is a partner and a registered representative for SDCF. Although an affiliated entity, it has no direct business involvement with SDWMA.

Schneider Downs & Co., Inc. (SDCo) - SDCo is a public accounting firm. As a shareholder of SDCo, Don does engage in activities relating to the accounting business.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

**Item 6: Supervision** - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDWMA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:

Nancy Skeans, CEO & CCO

412-697-5376

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# James R. Moyer

412-697-5643

## ***Schneider Downs Wealth Management Advisors, LP***

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

## **Item 2: Educational Background and Business Experience**

James R. Moyer

Born, 1989

### **Education:**

Slippery Rock University, M.B.A.

Slippery Rock University, B.S.B.A.

Duquesne University – Executive Certificate in Financial Planning

Pittsburgh Technical College – Associates Degree

### **Professional Designations \*:**

CERTIFIED FINANCIAL PLANNER™ Practitioner

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Investment Relationship Manager, 1/2020–

Present

Associate Investment Advisors – 1/2018-12/2019

PNC Wealth Management

Investment Advisor, 2/2017 – 1/2018

Analyst, 2/2016 – 2/2017

PNC Bank N.A.

Personal Banker, 5/2014 – 2/2016

U.S. Air Force – Air National Guard

Staff Sergeant, 7/2009 – 7/2016

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

**Item 6: Supervision** - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDWMA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:

Nancy Skeans, CEO & CCO

412-697-5376

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# Kelly M. Murphy

614-586-7118

## ***Schneider Downs Wealth Management Advisors, LP***

65 East State Street, Suite 2000

Columbus, OH 43215

614-621-4060

## **Item 2: Educational Background and Business Experience**

Kelly M. Murphy

Born, 1977

### **Education:**

University of Cincinnati – Associates Degree

### **Professional Designations \*:**

Financial Paraplanner Qualified Professional™

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Associate Investment Advisor, 3/2020 - Present

Wealth Management Associate, 11/2019 – 3/2020

Everhart Advisors

Relationship Manager, 6/2019-11-2019

Cassady Schiller Wealth Management, LLC

Client Service Administrator, 2/2005 – 6/2019

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

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Supervisory responsibilities are held by:

Nancy Skeans, CEO & CCO

412-697-5376

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# Daniel B. Napierkowski

412-697-5428

## ***Schneider Downs Wealth Management Advisors, LP***

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

## **Item 2: Educational Background and Business Experience**

Daniel B. Napierkowski

Born, 1974

### **Education:**

Indiana University of Pennsylvania, B.A.

### **Professional Designations \*:**

CERTIFIED FINANCIAL PLANNER™ Practitioner

Accredited Asset Management Specialist<sup>SM</sup>

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Investment Advisor, 4/2005 – Present

Service Representative 2/2001 – 4/2005

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

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Supervisory responsibilities are held by:

Nancy Skeans, CEO

412-697-5376

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# Alexander J. Papson

412-697-5488

## ***Schneider Downs Wealth Management Advisors, LP***

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

## **Item 2: Educational Background and Business Experience**

Alexander J. Papson

Born, 1992

### **Education:**

Duquesne University, M.B.A.

Gannon University, B.S.

### **Professional Designations \*:**

CERTIFIED FINANCIAL PLANNER™ Practitioner

Certified Health Savings Adviser (CHSA®)

Certified Plan Fiduciary Adviser (CPFA)

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Director of Fiduciary Solutions, 4/2019 – Present

D.B. Root & Company, LLC / R. Applegate & Associates, LLC

Associate Director, 1/2018 – 3/2019

Purshe Kaplan Sterling Investments

Registered Representative 1/2018-3/2019

Cantor Fitzgerald Wealth Partners, LLC

Relationship Manager, 3/2017 – 12/2017

Client Associate, 1/2016 – 2/2017

Client Administrator, 6/2015 – 12/2015

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

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Supervisory responsibilities are held by:

Nancy Skeans, CEO & CCO

412-697-5376

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# Scott R. Rain

412-697-5315

## ***Schneider Downs Wealth Management Advisors, LP***

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

## **Item 2: Educational Background and Business Experience**

Scott R. Rain

Born, 1973

### **Education:**

University of Pittsburgh, B.S.

University of Pittsburgh School of Law, J.D.

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Manager of Consulting Services 7/2019 -

Present

Investment Advisor, 5/2008 – 7/2019

Schneider Downs & Co., Inc.

Tax Senior, 1/2008 – Present

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

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Nancy Skeans, CEO & CCO

412-697-5376

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# Jason R. Staley

412-697-5280

## ***Schneider Downs Wealth Management Advisors, LP***

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

## **Item 2: Educational Background and Business Experience**

Jason R. Staley

Born, 1982

### **Education:**

Mercyhurst University, B.A.

### **Professional Designations \*:**

Chartered Financial Analyst®

Chartered Alternative Investment Analyst

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Investment Relationship Manager/Director of

Research and Due Diligence, 8/2016 - Present

Graystone Consulting / Morgan Stanley

Institutional Consulting Associate, 3/2016 – 8/2016

Credit Suisse Securities LLC

Assistant Vice President, 9/2008 – 3/2016

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

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Nancy Skeans, CEO & CCO

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# Kyle R. Zeller

614-586-7263

## ***Schneider Downs Wealth Management Advisors, LP***

65 East State Street, Suite 2000

Columbus, OH 43215

614-621-4060

## **Item 2: Educational Background and Business Experience**

Kyle R. Zeller

Born, 1974

### **Education:**

The Ohio State University, B.A.

### **Professional Designations \*:**

Certified Plan Fiduciary Adviser (CPFA)

Accredited Investment Fiduciary® (AIF®)

Qualified 401(k) Administrator (QKA)

### **Employment / Business Background for at least 5 previous years:**

Schneider Downs Wealth Management Advisors, LP

Investment Advisor, 10/2000 – Present

SagePoint Financial, Inc. \*\*

Registered Representative, 7/2001 – 12/2017

**Item 3: Disciplinary Information** - There is no disciplinary information to report.

**Item 4: Other Business Activities** - There are no other business activities to report.

**Item 5: Additional Compensation** - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

**Item 6: Supervision** - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDWMA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:

Nancy Skeans, CEO & CCO

412-697-5376

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\* Please refer to pages 17-18 of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

\*\* Formerly AIG Financial Advisors, Inc., which was formerly American General Securities Incorporated.

## Professional Designations Disclosures:

**Accredited Asset Management Specialist<sup>SM</sup>** – The College for Financial Planning<sup>®</sup> awards the ACCREDITED ASSET MANAGEMENT SPECIALIST<sup>SM</sup> AND AAMS<sup>®</sup> designation to students who; successfully complete the program; pass the final examination; and comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct and Terms and Conditions. Students must sign and return the Code of Ethics forms within six months of passing the final exam. Failure to complete and submit the forms within this time frame may result in termination of the individual's candidacy. Continued use of the AAMS<sup>®</sup> designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the AAMS<sup>®</sup> designation by: completing 16 hours of continuing education; reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self-disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct; and paying a biennial renewal fee.

The exam is offered electronically at a testing center. Topics include: The Asset Management Process, Investors, Policy & Change, Risk, Return & Investment Performance, Asset Allocation & Selection, Investment Strategies, Taxation of Investment Products, and Investment Opportunities for an Individual's Retirement, Investment Considerations for Small-Business Owners, and Deferred Compensation & Other Benefit Plans for Key Executives.

**Accredited Investment Fiduciary<sup>®</sup> (AIF<sup>®</sup>)** – The Accredited Investment Fiduciary<sup>®</sup> (AIF<sup>®</sup>) professional designation is offered through fi360's AIF Training program. AIF designees learn to identify when an individual or organization may be deemed to have fiduciary status, identify the legal standards that require fiduciaries to prudently manage investment decisions, apply the practices that define a prudent process for investment stewards and advisors, and strengthen their policies and procedures. Upon completion of the program you must pass a 90 minute closed book exam.

Ongoing AIF designees must; accrue six hours of continuing professional education annually, attest to a code of ethics, maintain current contact information in fi360's designee database and remit annual dues

**Accredited Investment Fiduciary Analyst<sup>TM</sup> (AIFA<sup>®</sup>)** – The Accredited Investment Fiduciary Analyst<sup>TM</sup> professional designation is offered through fi360's AIFA Training program. Applicants must have obtained the AIF<sup>®</sup> credential, complete the AIFA<sup>®</sup> training program and have a minimum of 8 years of relevant experience within the financial services industry. Upon completion of the specialized program on investment fiduciary standards of care, the designee will have a thorough knowledge of and ability to apply the fiduciary practices. They are qualified to conduct independent fiduciary reviews for nonprofit endowments and foundations, ERISA retirement plans, private family trusts and high net worth individuals.

Ongoing a minimum of 10 hours of Continuing Education must be accrued and reported to retain the credential. In addition, designees must review and update their application and remit payment of dues during their annual renewal cycle.

**CERTIFIED FINANCIAL PLANNER<sup>TM</sup> (CFP<sup>®</sup>)** - The CFP<sup>®</sup> certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP<sup>®</sup> certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP<sup>®</sup> marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning
- Examination – Pass the comprehensive CFP<sup>®</sup> Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP<sup>®</sup> professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP<sup>®</sup> professionals provide financial planning services at a fiduciary standard of care. This means CFP<sup>®</sup> professionals must provide financial planning services in the best interests of their clients.

CFP<sup>®</sup> professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP<sup>®</sup> certification.

**Certified Health Savings Adviser (CHSA®)** – The CHSA® is a nationally-recognized training and designation program that is designed to provide financial and employee benefit professionals with the knowledge and support required to take full advantage of the rapidly growing consumer-driven healthcare and HSA marketplaces - for the benefit of their clients as well as their own practices. The CHSA® is more than just the rules and regulations surrounding health savings accounts –though that is covered in the program. The CHSA® is designed to provide context as to how the HSA fits into the bigger puzzle of healthcare financing and retirement planning. As a prerequisites required to obtain the designation, an individual must be currently be employed or have two years of work experience in either the financial services or human resources / benefits industry. The certification program consists of four modules from Intro and the Basics to insights on a long-term strategy to utilize HSAs. Candidates must receive a passing score of 70% on the exam. The CHSA® certification signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for investment

**Certified Investment Management Analyst® (CIMA®)** – The CIMA certification signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for investment management consulting, including advanced investment management theory and application. Prerequisites for the CIMA certification are three years of financial services experience and an acceptable regulatory history. To obtain the CIMA certification, candidates must pass a proctored Qualification Examination, successfully complete a one-week classroom education program provided by a Registered Education Provider at an AACSB accredited university business school, pass an online Certification Examination, and have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements. CIMA designees are required to adhere to IWA's *Code of Professional Responsibility, Standards of Practice, and Rules and Guidelines for Use of the Marks*. CIMA designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through Investment and Wealth Institute (IWI).

**Certified Plan Fiduciary Adviser (CPFA)** – The CPFA credential demonstrates an adviser's knowledge, expertise and commitment to working with retirement plans. Plan advisers who earn their CPFA demonstrate the expertise required to act as a plan fiduciary or help plan fiduciaries manage their roles and responsibilities. Candidates must pass a qualifying exam that focuses on the following areas; ERISA Fiduciary Roles and Responsibilities, ERISA Fiduciary Oversight, ERISA Plan Investment Management, and ERISA Plan Management. In order to maintain your CPFA credentials, candidates must earn 20 continuing education credits every two years. Of those 20 credits, 2 must be on ethics / professionalism. The designation is administered through National Association of Plan Advisors (NAPA).

**Certified Public Accountant (CPA)** – In order to become a CPA in the United States, the candidate must sit for and pass the Uniform Certified Public Accountant Examination, which is set by the American Institute of Certified Public Accountants and administered by the National Association of State Boards of Accountancy. Eligibility to sit for the Uniform CPA Exam is determined by their individual State Boards of Accountancy. While state laws and regulations vary, typically the requirement is a U.S. bachelor's degree which includes a minimum number of qualifying credit hours in accounting and business administration. Most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA. All CPA candidates must pass the Uniform CPA Examination to qualify for a CPA certificate and license to practice public accounting. The CPA examination consists of four sections and is a rigorous, computerized exam.

CPAs are required to take continuing education courses in order to renew their license. Requirements vary by state. The vast majority of states require 120 hours of CPE every 3 years with a minimum of 20 hours per calendar year. As part of the CPE requirement, most states require their CPAs to take an ethics course during every renewal period. Ethics requirements vary by state, and the courses range from 2–8 hours. Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous *Code of Professional Conduct* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's *Code of Professional Conduct* within their state accountancy laws or have created their own.

**Chartered Alternative Investment Analyst (CAIA®)** – The CAIA® credential is for professionals managing, analyzing, distributing, or regulating alternative investments. Candidates must complete two exam levels from the characteristics of various strategies within each alternative asset class to portfolio management concepts central to alternative investments. The Level I exam consists of 200 multiple choice questions and covers 8 topics; professional standards and ethics, introduction to alternative investments, real assets, hedge funds, private equity, structured products and risk and portfolio management. Level II exam consists of 100 multiple choice questions, plus three sets of constructed response essay questions. The curriculum is broadly divided into two sections; alternative investments and core and integrated topics. Upon obtaining the CAIA® members must complete a self-evaluation tool every three years to fulfill the continuing education requirement.

**Chartered Financial Analyst® (CFA)** - To earn a CFA charter, you must have four years of qualified investment work experience, become a member of the CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in a six-hour exam. Level I is offered in June or December and Level II and III are administered in June. In passing these exams, candidates demonstrate their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.

**Financial Paraplanner Qualified Professional™ (FPQP)** - A Financial Paraplanner Qualified Professional (FPQP) has a proven expertise in the arena of financial planning, which helps them better advise their clients. They are different than most paraplanners because the average paraplanner rarely has a formal certification. Paraplanners are part of a financial planning team and often do most tasks associated with financial planning services. However, they do not usually take the lead in terms of client relationships. One can obtain a Financial Paraplanner Qualified Professional (FPQP) designation by enrolling in and successfully completing the Foundations in Financial Planning program. The FPQP certificate is offered by the College for Financial Planning (CFFP). FPQP certificate holders need to complete 16 hours of continuing education every other year.

**Qualified 401(k) Administrator (QKA)** - The Qualified 401(k) Administrator (QKA) is an offered designation by ASPAA for retirement plan professionals who work primarily with 401(k) plans. They typically assist employers and consultants with the recordkeeping, non-discrimination testing and the administrative aspects of 401(k) and related contribution plans. One must have 2 years related experience in the retirement plan industry, up to 200 hours of study to complete the credential and average completion time is 18 months. There are 3 areas of study to complete and test: Retirement Plan Fundamentals, Defined Contribution Administrative Issues – Basic Concepts (DC -1) and Defined Contribution Administrative Issues – Basic Concepts (DC -2). There is a requirement of 40 hours of continuing education in a two-year cycle and renew their ASPAA Membership annually to retain their credential(s).