

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

Website: www.sdwealthmanagement.com

Individuals Included in Supplement:

Skeans, Nancy, CEO
Derek Eichelberger, Partner

David Brinkman, Partner
Jason Staley, Partner

E. Matthew Biggs
Tyler Brose
Michael Bucci
Gregg Daily
Alissa Garcia
Miles Gibson
Demetrius Kokales
Sean McCann

James Moyer
Kelly Murphy
Daniel Napierkowski
Alexander Papson
Scott Rain
Kyle Zeller

Effective Date: December 6, 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 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.

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

* 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.

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

Managing Director/Partner, 7/2021 – Present (Partner since 7/2018)

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.

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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

Partner, 7/2021 - Present

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.

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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

Partner, 7/2021 - Present

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

412-697-5376

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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

Investment Advisor, 7/2021 - Present

Associate Investment Advisor, 10/2018 – 6/2021

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.

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Nancy Skeans, CEO & CCO

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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

Senior Retirement Plan Advisor, 7/2021 – Present

Associate Investment Advisor, 3/2019 –6/2021

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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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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412-697-5376

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Gregg W. Daily

412-697-5682

Schneider Downs Wealth Management Advisors, LP

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

Item 2: Educational Background and Business Experience

Gregg W. Daily

Born, 1972

Education:

Sanford Brown, AA

Professional Designations *:

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP

Investment Relationship Manager, 11/2021 – Present

PNC Bank NA

Institutional Trust Office, 01/2020 – 11/2021

Fragasso Financial Advisors

Financial Advisor, 03/2002 – 08/2019

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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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.

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Supervisory responsibilities are held by:

Nancy Skeans, CEO & CCO

412-697-5376

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Miles B. Gibson

412-697-5363

Schneider Downs Wealth Management Advisors, LP

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

Item 2: Educational Background and Business Experience

Miles B. Gibson

Born, 1993

Education:

University of Pittsburgh, B.S.

Professional Designations *:

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP

Senior Associate Retirement Plan Advisor, 10/2021 –

Present

United States Marine Corp. Reserves

Intelligence Officer 10/2021 – Present

United States Marine Corp.

Intelligence Officer 1/2019 – 9/2021

SDAdvantage Retirement Solutions, LP

03/2018 – 12/2018

Schneider Downs & Co., Inc.

Intern 09/2017 – 03/2018

Intern 06/2016 – 09/2016

Wilkins Township Road Department

Laborer 05/2017 – 09/2017

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.

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Supervisory responsibilities are held by:

Nancy Skeans, CEO & CCO

412-697-5376

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Demetrius A. Kokales

412-697-5869

Schneider Downs Wealth Management Advisors, LP

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

Item 2: Educational Background and Business Experience

Demetrius A. Kokales

Born, 1994

Education:

Duquesne University, 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, 11/2021 – Present

Greek Orthodox Church

Bookkeeping 11/2021 - Present

Fort Pitt Capital Group, LLC

Planning Specialist 11/2019 – 11/2021

PNC Investments

Internal Licensing Program 5/2019 – 11/2019

Customer Service and Support Representative 12/2016 – 11/2019

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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Sean L. McCann

412-697-5316

Schneider Downs Wealth Management Advisors, LP

One PPG Place, Suite 1700

Pittsburgh, PA 15222

412-697-5200

Item 2: Educational Background and Business Experience

Sean L. McCann

Born, 1998

Education:

Waynesburg University, B.S.

Professional Designations *:

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP

Investment Analyst 1/2021 – Present

Intern 5/2019 – 3/2020

BNY Mellon

Portfolio Accountant 6/2020 – 1/2021

Amazon

Shipping 4/2020 – 6/2020

Macy's

Expeditor 4/2017 – 5/2019

Kmart

Sales Associate 6/2015 – 3/2017

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

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

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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.

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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

Retirement Plan Advisor, 7/2021 - Present

Associate Investment Advisor, 3/2020 – 6/2021

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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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 SpecialistSM

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP

Senior Relationship Manager, 6/2017 – Present

Relationship Manager, 4/2005 – 6/2017

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.

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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.

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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.

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

* 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.

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

Senior Relationship Manager 7/2017 – Present

Relationship Manager, 10/2000 – 6/2017

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

* 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 SpecialistSM – The College for Financial Planning[®] awards the ACCREDITED ASSET MANAGEMENT SPECIALISTSM AND AAMS[®] 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[®] designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the AAMS[®] 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[®] (AIF[®]) – The Accredited Investment Fiduciary[®] (AIF[®]) 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 AnalystTM (AIFA[®]) – The Accredited Investment Fiduciary AnalystTM professional designation is offered through fi360's AIFA Training program. Applicants must have obtained the AIF[®] credential, complete the AIFA[®] 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 PLANNERTM (CFP[®]) - The CFP[®] certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP[®] certification. It is recognized in the United States and several 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[®] 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[®] 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[®] 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[®] professionals provide financial planning services at a fiduciary standard of care. This means CFP[®] professionals must provide financial planning services in the best interests of their clients.

CFP[®] 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[®] 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 prerequisite required to obtain the designation, an individual must 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. 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 to renew their license. Requirements vary by state. Most 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. Most 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).