

BrightPlan

Item 1: Cover Page
ADV Part 2B: Brochure Supplement

March 31, 2026

333 West San Carlos Street, Suite 600
San Jose, CA 95110
Tel: (408) 933-6188

www.brightplan.com

This brochure supplement provides information about our investment professionals that supplements the BrightPlan LLC (“BrightPlan”) brochure.

You should have received a copy of that brochure. Please contact Naomi Kantrowitz, Chief Compliance Officer, at (408) 933-6188, if you did not receive BrightPlan, LLC’s brochure or if you have any questions about the contents of this supplement.

Investment professionals included in this brochure supplement:

Daniel Lee
Magdala Adeleke
Luis Amato

Joan Gonzalez
Chantal Hersey
Daniel Stokes

Additional information about BrightPlan and our investment professionals is also available on the SEC’s website at www.adviserinfo.sec.gov.

Daniel S Lee, CFA, CFP®
BrightPlan, LLC
333 West San Carlos Street, Suite 600
San Jose, CA 95110
Tel: (408) 933-6188

Dated: March 31, 2026

This brochure supplement provides information about Daniel S Lee that supplements the BrightPlan, LLC brochure. You should have received a copy of that brochure. Please contact Naomi Kantrowitz, Chief Compliance Officer, at (408) 933-6188, if you did not receive BrightPlan, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Mr. Lee is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Daniel S Lee, CFA, CFP®, EA

VP of Global, 03/2024 – Present
Member of BrightPlan Investment Committee
Year of Birth: 1983

EDUCATION

University of Michigan, B.S., Economics, Biopsychology/Neuroscience, 2005
UC Berkeley Extension, Certificate in Personal Financial Planning, 2009

DESIGNATIONS

Chartered Financial Analyst (CFA) Charterholder
CERTIFIED FINANCIAL PLANNER™, planning practitioner
Enrolled Agent (EA) – IRS

CFA - The Chartered Financial Analyst ("CFA") designation is issued by the CFA Institute. CFA candidates must meet one of the following requirements: (1) undergraduate degree and four years of professional experience involving investment decision-making, or (2) four years qualified work experience (full time, but not necessarily investment related) to receive the CFA designation, candidates must complete the CFA Program which is organized into three levels, each requiring 250 hours of self-study and each culminating in a six-hour exam. Candidates must enter into a Member's Agreement, a Professional Conduct Statement, and any additional documentation requested by CFA Institute. There are no ongoing continuing education or experience thresholds necessary to maintain the CFA designation. CFA® and Chartered Financial Analyst® are registered trademarks owned by the CFA Institute. More information about the designation is available at <https://www.cfainstitute.org>.

CFP – The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). To attain the right to use the CFP® marks, an individual must satisfactorily fulfill various requirements including completing education requirements; passing the CFP® Certification Examination; completing at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and agreeing to be bound by CFP Board's Standards of Professional Conduct. In addition, ongoing education and ethics requirements must be met in order to maintain the right to continue to use the CFP® marks.

EA – An Enrolled Agent (EA) is an individual who represents taxpayers before the Internal Revenue Service. Enrolled agents, like attorneys and CPAs, are generally unrestricted as to which taxpayer they can represent, which types of tax matters they can handle, and which IRS offices they can represent clients before. To become an EA an individual must: 1) obtain a Preparer Tax Identification Number (PTIN); 2) achieve passing scores on all parts of the Special Enrollment Examination (SEE) within three years; 3) apply for enrollment; 4) and pass a suitability check, which will include tax compliance, to ensure applicants have filed all necessary tax returns and there are no outstanding tax liabilities, and a criminal background check. In addition, an EAs must adhere to ethical standards, renew their status every three years, obtain continuing education and renew their PTIN annually.

PAST BUSINESS EXPERIENCE

BrightPlan, LLC, San Jose, CA

Director, Financial Planning and Advice, 08/2021 – 03/2024

Plancorp, LLC, St. Louis, MO:

Senior Wealth Manager, 7/2019 – 8/2021

Wealth Manager, 1/2019 – 06/2019

Bingham, Osborn & Scarborough LLC, San Francisco, CA:

Wealth Manager, 01/2015 – 01/2019

Portfolio Associate, 01/2013 – 12/2014

Portfolio Administrator, 02/2009 – 12/2012

Portfolio Assistant, 04/2008 – 02/2009

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

Employed by the University of California - Berkeley. Instructor at The UC Berkeley – Extension Certificate Program in Personal Financial Planning. Started: 01/2018 - Present

Item 5 Additional Compensation

None.

Item 6 Supervision

The Investment Committee oversees the firm's investment activities. Mr. Lee is supervised by Larry Robinson, who is the Chief Product Officer. Mr. Lee is subject to BrightPlan's code of ethics and the firm's policies and procedures. Please contact Mr. Robinson at (408) 933-6188 if you have any questions about this brochure supplement.

Magdala M Adeleke , CFP®
BrightPlan, LLC
333 West San Carlos Street, Suite 600
San Jose, CA 95110
Tel: (408) 933-6188

Dated: March 31, 2026

This brochure supplement provides information about Magdala Adeleke that supplements the BrightPlan, LLC brochure. You should have received a copy of that brochure. Please contact Naomi Kantrowitz, Chief Compliance Officer, at (408) 933-6188, if you did not receive BrightPlan, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Ms. Adeleke is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Magdala M Adeleke, CFP®

Financial Wellness Coach, 09/2022 – Present
Year of Birth: 1981

EDUCATION

Syracuse University – Martin J Whitman School of Management, BBA, Finance and Psychology 2003
University of Amsterdam – M.S., International Development, 2009

DESIGNATIONS

CFP – The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). To attain the right to use the CFP® marks, an individual must satisfactorily fulfill various requirements including completing education requirements; passing the CFP® Certification Examination; completing at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and agreeing to be bound by CFP Board's Standards of Professional Conduct. In addition, ongoing education and ethics requirements must be met in order to maintain the right to continue to use the CFP® marks.

PAST BUSINESS EXPERIENCE

BrightPlan, LLC, San Jose, CA:
Financial Wellness Coach, 9/2022 – Present
Financial Therapeace, Elkridge, MD:
Financial Therapist, 07/2020 – 09/2022
Pact, Washington, DC:
Senior Finance Officer , 09/2011 – 11/2012
Acadamy for Educational Development, Washington, DC:
Finance Officer, 12/2009 – 02/2024
HSBC Bank USA, Mount Vernon, NY
Service Advisor, 07/2004 – 06/2006

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

None.

Item 5 Additional Compensation

None.

Item 6 Supervision

The Investment Committee oversees the firm's investment activities. Ms. Adeleke is supervised by Daniel Lee, who is the Vice President of Global. Ms. Adeleke is subject to BrightPlan's code of ethics and the firm's policies and procedures. Please contact Mr. Lee at (408) 933-6188 if you have any questions about this brochure supplement.

Luis Amato, ChFC® CFP®
BrightPlan, LLC
333 West San Carlos Street, Suite 600
San Jose, CA 95110
Tel: (408) 933-6188

Dated: March 31, 2026

This brochure supplement provides information about Luis Amato that supplements the BrightPlan, LLC brochure. You should have received a copy of that brochure. Please contact Naomi Kantrowitz, Chief Compliance Officer, at (408) 933-6188, if you did not receive BrightPlan, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Mr. Amato is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Luis Amato, ChFC® CFP®

Financial Wellness Coach, 08/2024 – Present
Year of Birth: 1972

EDUCATION

Master of Science, Space Operations, University of North Dakota, 2001
Bachelor of Science, Physics, Universidad de Puerto Rico, 1996

DESIGNATIONS

Chartered Financial Consultant (ChFC®), 2024 – Present
Certified Financial Planner™ (CFP®) 2024 – Present

CFP – The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). To attain the right to use the CFP® marks, an individual must satisfactorily fulfill various requirements including completing education requirements; passing the CFP® Certification Examination; completing at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and agreeing to be bound by CFP Board's Standards of Professional Conduct. In addition, ongoing education and ethics requirements must be met in order to maintain the right to continue to use the CFP® marks.

ChFC® – The Chartered Financial Consultant (ChFC®) designation is issued by The American College. ChFC candidates must have three years of full-time relevant business experience and a high school diploma or the equivalent. To receive the ChFC designation candidates must successfully complete the eight required courses and agree to comply with The American College code of ethics and procedures. Participation in the annual Professional Recertification Program (PRP) is required to maintain the designation. ChFC® and Chartered Financial Consultant® are registered trademarks owned by The American College.

PAST BUSINESS EXPERIENCE

Hightower Advisors, Chicago, IL:
Financial Planner, 08/2023 – 03/2024
Adero Partners, LLC., Palo Alto, CA:
Financial Planner, 04/2022 – 06/2023
Unemployed, Roswell, GA, 04/2021-04/2022
BOOM ATL Marketing, Roswell, GA:
Owner, 01/2013– 03/2021

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

None.

Item 5 Additional Compensation

None.

Item 6 Supervision

The Investment Committee oversees the firm's investment activities. Mr. Amato is supervised by Daniel Lee, who is the Vice President of Global Mr. Amato is subject to BrightPlan's code of ethics and the firm's policies and procedures. Please contact Mr. Lee at (408) 933-6188 if you have any questions about this brochure supplement.

Joan Gonzalez, CFP®
BrightPlan, LLC
333 West San Carlos Street, Suite 600
San Jose, CA 95110
Tel: (408) 933-6188

Dated: March 31, 2026

This brochure supplement provides information about Joan Gonzalez that supplements the BrightPlan, LLC brochure. You should have received a copy of that brochure. Please contact Naomi Kantowitz, Chief Compliance Officer, at (408) 933-6188, if you did not receive BrightPlan, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Ms. Gonzalez is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Joan Gonzalez, CFP®

Manager, Global Advisor Network – Americas, 06/2024 – Present
Financial Advisor, 06/2021 – 06/2024
Year of Birth: 1963

EDUCATION

Bachelor of Science, Marketing Management, Boston University, 1989

DESIGNATIONS

CERTIFIED FINANCIAL PLANNER™, CFP®

CFP – The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). To attain the right to use the CFP® marks, an individual must satisfactorily fulfill various requirements including completing education requirements; passing the CFP® Certification Examination; completing at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and agreeing to be bound by CFP Board's Standards of Professional Conduct. In addition, ongoing education and ethics requirements must be met in order to maintain the right to continue to use the CFP® marks.

PAST BUSINESS EXPERIENCE

Advice Systems, Inc., Westborough, MA:

Financial Planning Research Analyst, 04/2019 – 01/2020

Winslow, Evans & Crocker, Inc., Boston, MA:

First Vice President, CFP®, 01/2014 – 04/2019

The Midas Collaborative, Allston, MA:

Financial Wellness Coach, 06/2013 – 12/2018

Financial Planning Association of MA, Westborough, MA:

Director of Partnerships, Board Member, 01/2010 – 12/2013

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

None.

Item 5 Additional Compensation

None.

Item 6 Supervision

The Investment Committee oversees the firm's investment activities. Ms. Gonzalez is supervised by Daniel Lee, who is the Vice President of Global. Ms. Gonzalez is subject to BrightPlan's code of ethics and the firm's policies and procedures. Please contact Mr. Lee at (408) 933-6188 if you have any questions about this brochure supplement.

Chantal Hersey, CFP®
BrightPlan, LLC
333 West San Carlos Street, Suite 600
San Jose, CA 95110
Tel: (408) 933-6188

Dated: March 31, 2026

This brochure supplement provides information about Chantal Hersey that supplements the BrightPlan, LLC brochure. You should have received a copy of that brochure. Please contact Naomi Kantrowitz, Chief Compliance Officer, at (408) 933-6188, if you did not receive BrightPlan, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Ms. Hersey is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Chantal Hersey, CFP®

Manager, Global Advisor Network – APAC, 06/2024 – Present
Financial Advisor, 01/2023 – 06/2024
Year of Birth: 1991

EDUCATION

B.S., Business Administration, University of San Francisco, San Francisco, 2013

DESIGNATIONS

CERTIFIED FINANCIAL PLANNER™, CFP®

CFP – The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). To attain the right to use the CFP® marks, an individual must satisfactorily fulfill various requirements including completing education requirements; passing the CFP® Certification Examination; completing at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and agreeing to be bound by CFP Board's Standards of Professional Conduct. In addition, ongoing education and ethics requirements must be met in order to maintain the right to continue to use the CFP® marks.

PAST BUSINESS EXPERIENCE

Tremorsync, Inc., San Francisco, CA:
Ice Skating Coach, 07/2013 – present
The Financial Zen Group, Inc., San Francisco, CA:
Financial Planner, 05/2020 – 01/2023
Bingham, Osborn & Scarborough LLC, San Francisco, CA:
Senior Client Associate, 07/2014 – 09/2019
Portfolio Assistant, 09/2013 – 07/2014

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

None.

Item 5 Additional Compensation

None.

Item 6 Supervision

The Investment Committee oversees the firm's investment activities. Ms. Hersey is supervised by Daniel Lee, who is the Vice President of Global. Ms. Hersey is subject to BrightPlan's code of ethics and the firm's policies and procedures. Please contact Mr. Lee at (408) 933-6188 if you have any questions about this brochure supplement.

Daniel Lee Stokes, CFP®
BrightPlan, LLC
333 West San Carlos Street, Suite 600
San Jose, CA 95110
Tel: (408) 933-6188

Dated: March 31, 2026

This brochure supplement provides information about Daniel Lee Stokes that supplements the BrightPlan, LLC brochure. You should have received a copy of that brochure. Please contact Naomi Kantrowitz, Chief Compliance Officer, at (408) 933-6188, if you did not receive BrightPlan, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Mr. Stokes is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Daniel Lee Stokes, CFP®

Manager, Global Advisor Network – Europe, 06/2024 – Present
Financial Advisor, 09/2022 – 06/2024
Year of Birth: 1988

EDUCATION

Bachelor of Human Environment Sciences, Personal Financial Planning, University of Missouri-Columbia, 2016

DESIGNATIONS

CERTIFIED FINANCIAL PLANNER™, CFP®

CFP® – The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). To attain the right to use the CFP® marks, an individual must satisfactorily fulfill various requirements including completing education requirements; passing the CFP® Certification Examination; completing at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and agreeing to be bound by CFP Board's Standards of Professional Conduct. In addition, ongoing education and ethics requirements must be met in order to maintain the right to continue to use the CFP® marks.

PAST BUSINESS EXPERIENCE

BrightPlan, LLC, San Jose, CA:

Client Success Advocate, 05/20219 – 08/2022

Plancorp, LLC, St. Louis, MO:

Financial Planning Associate, 06/2016 – 05/2019

University of Missouri, Office for Financial Success, Columbia, MO:

Student President, 08/2015 – 05/2016

Veterans United Home Loans, Columbia, MO:

Lighthouse Intern, 05/2015 – 08/2015

Commerce Bank, Columbia, MO:

Utility Bank Teller, 01/2014 – 04/2015

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

None.

Item 5 Additional Compensation

None.

Item 6 Supervision

The Investment Committee oversees the firm's investment activities. Mr. Stokes is supervised by Daniel Lee, who is the Vice President of Global. Mr. Stokes is subject to BrightPlan's code of ethics and the firm's policies and procedures. Please contact Mr. Lee at (408) 933-6188 if you have any questions about this brochure supplement.



Plancorp, LLC - Part 2Bs

January 28, 2026

540 Maryville Centre Drive, Suite 105
St. Louis, MO 63141

Phone: (636) 532 7824

www.plancorp.com

Plancorp, LLC Part 2Bs are included for the following investment professionals:

Bob Anderberg

Mary Crawley

Brian Watson

Odaro Aisueni

Devin Ploesser

Yezmin Thomas

Dawn Torres-Gale

Please contact John Sastry, Chief Compliance Officer, at (636) 532-7824, if you have any questions.

Additional information about Plancorp is also available on the SEC's website at www.adviserinfo.sec.gov.

Item 1: Cover Page

Plancorp, LLC

Form ADV Part 2B Brochure Supplement for Bob Anderberg

Address: 540 Maryville Centre
Drive Suite 105
Saint Louis, MO 63141

Phone: (636) 532-7824

Website: <https://www.plancorp.com/>

This brochure supplement provides information about Bob Anderberg that supplements the Plancorp, LLC brochure. You should have received a copy of that brochure. Please contact Plancorp, LLC if you did not receive Plancorp, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Bob Anderberg is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 7 020592.

Item 2: Educational Background & Business Experience

Name: Robert Anderberg

Year of Birth: 1967

Post-Secondary Education: Masters Degree in Plant Physiology
Washington State University
1992

Bachelor of Science in Microbiology
Washington State University
1989

Business Background: Financial Wellness Advisor
Plancorp, LLC
Jun 2024 – Present

Director of Financial Planning
Murray Street Capital Advisors LLC
Feb 2024 – Jun 2024

Personal Finance Counselor III
Magellan Federal
Nov 2023 – Jun 2024

Paraplanner & Financial Advisor (prev. Analyst)
F5 Financial Planning LLC
May 2020 – Nov 2023

Professional Designations : CERTIFIED FINANCIAL PLANNER® professional

CFP – The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). To attain the right to use the CFP® marks, an individual must satisfactorily fulfill various requirements including completing education requirements; passing the CFP® Certification Examination; completing at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and agreeing to be bound by CFP Board’s Standards of Professional Conduct. In addition, ongoing education and ethics requirements must be met in order to maintain the right to continue to use the CFP® marks.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client’s or prospective client’s evaluation of Bob Anderberg.

Item 4: Other Business Activities

Bob Anderberg is not actively engaged in any other investment-related business or occupation.

Bob Anderberg is not actively engaged in any other business or occupation for compensation that provides a substantial source of income or involves a substantial amount of time.

Item 5: Additional Compensation

Bob Anderberg does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through Plancorp, LLC.

Item 6: Supervision

Bob Anderberg is supervised and monitored by Derek Hartley, Chief Growth Officer, pursuant to Plancorp, LLC's written policies and procedures and code of ethics. Derek Hartley may be reached using the contact information on the cover page of this brochure supplement.

Item 1: Cover Page

Plancorp, LLC

Form ADV Part 2B Brochure Supplement for Mary Crawley

Address: 540 Maryville Centre
Drive Suite 105
Saint Louis, MO 63141

Phone: (636) 532-7824

Website: <https://www.plancorp.com/>

This brochure supplement provides information about Mary Crawley that supplements the Plancorp, LLC brochure. You should have received a copy of that brochure. Please contact Plancorp, LLC if you did not receive Plancorp, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Mary Crawley is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 7700254.

Item 2: Educational Background & Business Experience

Name: Mary Crawley

Year of Birth: 1971

Post-Secondary Education: M.B.A.

University of Tennessee 2000
B.A., Elementary Education & Psychology
William and Mary
1993

Business Background: Financial Wellness Advisor

Plancorp, LLC
Jan 2024 – Present

Personal Financial Counselor
Magellan Federal
Aug 2023 – Present

Investment Adviser Representative
Family Legacy Financial Solutions
Feb 2023 – Dec 2023

Personal Finance Counselor
Zeiders Enterprises, Inc.
Jan 2023 – Aug 2023

Personal Finance Counselor
The Bowen Consulting Group
Apr 2018 – Dec 2022

Professional Designations : CERTIFIED FINANCIAL PLANNER® professional

CFP – The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). To attain the right to use the CFP® marks, an individual must satisfactorily fulfill various requirements including completing education requirements; passing the CFP® Certification Examination; completing at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and agreeing to be bound by CFP Board’s Standards of Professional Conduct. In addition, ongoing education and ethics requirements must be met in order to maintain the right to continue to use the CFP® marks.

Accredited Financial Counselor (AFC)

AFC® - The Accredited Financial Counselor (AFC®) designation is offered and recognized by the Association for Financial Counseling and Planning Education (AFCPE). To earn this designation, candidates must: 1) complete 1,000 hours of financial counseling experience; 2) submit three letters of reference attesting to professional competence and experience; 3) meet the educational requirement by selecting an AFC Education Pathway; 4) pass the final certification exam; 5) and complete 30 hours of continuing education every two years.

Chartered Financial Consultant (ChFC)

ChFC - The Chartered Financial Consultant (ChFC) designation is issued by The American College. ChFC candidates must have three years of full-time relevant business experience and a high school diploma or the equivalent. To receive the ChFC designation candidates must successfully complete the eight required courses and agree to comply with The American College code of ethics and procedures. Participation in the annual Professional Recertification Program (PRP) is required to maintain the designation. ChFC® and Chartered Financial Consultant® are registered trademarks owned by the The American College. More information about the designation is available at <https://www.theamericancollege.edu>.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Mary Crawley.

Item 4: Other Business Activities

Mary Crawley is not actively engaged in any other investment-related business or occupation.

Mary Crawley is not actively engaged in any other business or occupation for compensation that provides a substantial source of income or involves a substantial amount of time.

Item 5: Additional Compensation

Mary Crawley does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through Plancorp, LLC.

Item 6: Supervision

Mary Crawley is supervised and monitored by Derek Hartley, Chief Growth Officer, pursuant to Plancorp, LLC's written policies and procedures and code of ethics. Derek Hartley may be reached using the contact information on the cover page of this brochure supplement.

Item 1: Cover Page

Plancorp, LLC

Form ADV Part 2B Brochure Supplement for Brian Watson

Address: 540 Maryville Centre
Drive Suite 105
Saint Louis, MO 63141

Phone: (636) 532-7824

Website: <https://www.plancorp.com/>

This brochure supplement provides information about Brian Watson that supplements the Plancorp, LLC brochure. You should have received a copy of that brochure. Please contact Plancorp, LLC if you did not receive Plancorp, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Brian Watson is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 6960644.

Item 2: Educational Background & Business Experience

Name: Brian Watson

Year of Birth: 1996

Post-Secondary Education: B.A., Finance & Economics
Southern Illinois State University
2018

Business Background: Financial Wellness Team Lead
Plancorp, LLC
Jun 2024 – Present

Wealth Manager
Plancorp, LLC
Jan 2024 – June 2024

Financial Planner
Plancorp, LLC
Feb 2020 – Jan 2024

Professional Designations: CERTIFIED FINANCIAL PLANNER® professional

CFP – The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). To attain the right to use the CFP® marks, an individual must satisfactorily fulfill various requirements including completing education requirements; passing the CFP® Certification Examination; completing at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and agreeing to be bound by CFP Board’s Standards of Professional Conduct. In addition, ongoing education and ethics requirements must be met in order to maintain the right to continue to use the CFP® marks.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client’s or prospective client’s evaluation of Brian Watson.

Item 4: Other Business Activities

Brian Watson is not actively engaged in any other investment-related business or occupation.

Brian Watson is not actively engaged in any other business or occupation for compensation that provides a substantial source of income or involves a substantial amount of time.

Item 5: Additional Compensation

Brian Watson does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through Plancorp, LLC.

Item 6: Supervision

Brian Watson is supervised and monitored by Derek Hartley, Chief Growth Officer, pursuant to Plancorp, LLC's written policies and procedures and code of ethics. Derek Hartley may be reached using the contact information on the cover page of this brochure supplement.

Item 1: Cover Page

Plancorp, LLC

Form ADV Part 2B Brochure Supplement for Odaro Aisueni

Address: 540 Maryville Centre
Drive Suite 105
Saint Louis, MO 63141

Phone: (636) 532-7824

Website: <https://www.plancorp.com/>

This brochure supplement provides information about Odaro Aisueni that supplements the Plancorp, LLC brochure. You should have received a copy of that brochure. Please contact Plancorp, LLC if you did not receive Plancorp, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Odaro Aisueni is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 7683782.

Item 2: Educational Background & Business Experience

Name: Odaro Aisueni

Year of Birth: 1997

Post-Secondary Education: Bachelors of Science Personal Financial Planning
Texas Tech University
2020

Business Background: Financial Wellness Advisor
Plancorp, LLC
Nov 2025 – Present

Financial Planner
Austin Wealth Management
Jan 2025 – Sep 2025

Investment Adviser Representative
Willis Johnson & Associates, Inc.
Jan 2024 – Oct 2024

Associate Wealth Manager
Willis Johnson & Associates
Jan 2024 – Oct 2024

Wealth Planning Administrator
Carson Group
Sep 2022 – Jan 2024

Senior Financial Planner
Plancorp, LLC
May 2020 – Aug 2022

Professional Designations: CERTIFIED FINANCIAL PLANNER® professional

CFP – The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). To attain the right to use the CFP® marks, an individual must satisfactorily fulfill various requirements including completing education requirements; passing the CFP® Certification Examination; completing at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and agreeing to be bound by CFP Board’s Standards of Professional Conduct. In addition, ongoing education and ethics requirements must be met in order to maintain the right to continue to use the CFP® marks.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client’s or prospective client’s evaluation of Odaro Aisueni.

Item 4: Other Business Activities

Odaro Aisueni is not actively engaged in any other investment-related business or occupation.

Odaro Aisueni is not actively engaged in any other business or occupation for compensation that provides a substantial source of income or involves a substantial amount of time.

Item 5: Additional Compensation

Odaro Aisueni does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through Plancorp, LLC.

Item 6: Supervision

Odaro Aisueni is supervised and monitored by Brian Watson, Financial Wellness Team Lead, pursuant to Plancorp, LLC's written policies and procedures and code of ethics. Brian Watson may be reached using the contact information on the cover page of this brochure supplement.

Item 1: Cover Page

Plancorp, LLC

Form ADV Part 2B Brochure Supplement for Devin Ploesser

Address: 540 Maryville Centre
Drive Suite 105
Saint Louis, MO 63141

Phone: (636) 532-7824

Website: <https://www.plancorp.com/>

This brochure supplement provides information about Devin Ploesser that supplements the Plancorp, LLC brochure. You should have received a copy of that brochure. Please contact Plancorp, LLC if you did not receive Plancorp, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Devin Ploesser is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 5973755.

Item 2: Educational Background & Business Experience

Name: Devin Ploesser

Year of Birth: 1969

Post-Secondary Education: B.S., Finance & Accounting
Maryville University of Saint Louis
1995

Business Background: Client Development Manager
Plancorp, LLC
Aug 2024 – Present

Registered Representative
Wells Fargo Clearing Services, LLC
Feb 2022 – Jul 2024

Registered Representative
Wells Fargo Clearing Services, LLC
Aug 2018 – Nov 2021

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Devin Ploesser.

Item 4: Other Business Activities

Devin Ploesser is not actively engaged in any other investment-related business or occupation.

Devin Ploesser is not actively engaged in any other business or occupation for compensation that provides a substantial source of income or involves a substantial amount of time.

Item 5: Additional Compensation

Devin Ploesser does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through Plancorp, LLC.

Item 6: Supervision

Devin Ploesser is supervised and monitored by Derek Hartley, Chief Growth Officer, pursuant to Plancorp, LLC's written policies and procedures and code of ethics. Derek Hartley may be reached using the contact information on the cover page of this brochure supplement.

Item 1: Cover Page

Plancorp, LLC

Form ADV Part 2B Brochure Supplement for Yezmin Thomas

Address: 540 Maryville Centre
Drive Suite 105
Saint Louis, MO 63141

Phone: (636) 532-7824

Website: <https://www.plancorp.com/>

This brochure supplement provides information about Yezmin Thomas that supplements the Plancorp, LLC brochure. You should have received a copy of that brochure. Please contact Plancorp, LLC if you did not receive Plancorp, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Yezmin Thomas is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 7444621.

Item 2: Educational Background & Business Experience

Name: Yezmin Thomas

Year of Birth: 1977

Post-Secondary Education: Masters Degree in Mass Communication
University of Central Missouri
2008

Bachelor of Communication Sciences
Instituto Tecnológico y de Estudios Superiores de Occidente (ITESO)
2000

Business Background: Wealth Manager

Plancorp, LLC
Aug 2024 – Present

Financial Wellness Advisor
Plancorp, LLC
Feb 2022 – Jul 2024

Member
Yezmin Thomas Media, LLC
Sep 2018 – Dec 2022

News Reporter
Entravision Communications
Mar 2019 – Feb 2022

Investment Adviser Representative
Cambridge Investment Research Advisors, Inc.
Oct 2021 – Jan 2022

Professional Designations: CERTIFIED FINANCIAL PLANNER® professional

CFP – The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). To attain the right to use the CFP® marks, an individual must satisfactorily fulfill various requirements including completing education requirements; passing the CFP® Certification Examination; completing at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and agreeing to be bound by CFP Board’s Standards of Professional Conduct. In addition, ongoing education and ethics requirements must be met in order to maintain the right to continue to use the CFP® marks.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client’s or prospective client’s evaluation of Yezmin Thomas.

Item 4: Other Business Activities

Yezmin Thomas is not actively engaged in any other investment-related business or occupation.

Yezmin Thomas is the Owner of Butterhouse Bakeshop, LLC.

Item 5: Additional Compensation

Yezmin Thomas does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through Plancorp, LLC.

Item 6: Supervision

Yezmin Thomas is supervised and monitored by Kevin Daniel, Senior Wealth Manager, pursuant to Plancorp, LLC's written policies and procedures and code of ethics. Kevin Daniel may be reached using the contact information on the cover page of this brochure supplement.

Item 1: Cover Page

Plancorp, LLC

Form ADV Part 2B Brochure Supplement for Dawn Torres-Gale

Address: 540 Maryville Centre
Drive Suite 105
Saint Louis, MO 63141

Phone: (636) 532-7824

Website: <https://www.plancorp.com/>

This brochure supplement provides information about Dawn Torres-Gale that supplements the Plancorp, LLC brochure. You should have received a copy of that brochure. Please contact Plancorp, LLC if you did not receive Plancorp, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Dawn Torres-Gale is available on the SEC's website at www.adviserinfo.sec.gov and by searching for CRD# 7443807.

Item 2: Educational Background & Business Experience

Name: Dawn Torres-Gale

Year of Birth: 1972

Post-Secondary Education: Masters Degree in Public Administration
University of Hawaii
2005

Bachelor of Political Science
San Francisco State University
2002

Business Background: Financial Wellness Advisor

Plancorp, LLC
Jun 2024 – Present

Client Services Manager
Compass Planning Associates Inc
Sep 2022 – Jun 2024

Associate Financial Planner
Creative Money
Jun 2021 – Jun 2022

Financial Counselor
Our Money Goals
Apr 2017 – Sep 2022

Personal Finance Counselor
Zeiders Enterprises
Nov 2012 – Jan 2021

Professional Designations: CERTIFIED FINANCIAL PLANNER® professional

CFP – The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). To attain the right to use the CFP® marks, an individual must satisfactorily fulfill various requirements including completing education requirements; passing the CFP® Certification Examination; completing at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and agreeing to be bound by CFP Board’s Standards of Professional Conduct. In addition, ongoing education and ethics requirements must be met in order to maintain the right to continue to use the CFP® marks.

Accredited Financial Counselor (AFC)

AFC® - The Accredited Financial Counselor (AFC®) designation is offered and recognized by the Association for Financial Counseling and Planning Education (AFCPE). To earn this designation, candidates must: 1) complete 1,000 hours of financial counseling experience; 2) submit three letters of reference attesting to professional competence and experience; 3) meet the educational requirement by selecting an AFC Education Pathway; 4) pass the final certification exam; 5) and complete 30 hours of continuing education every two years.

Chartered Financial Consultant (ChFC)

ChFC - The Chartered Financial Consultant (ChFC) designation is issued by The American College. ChFC candidates must have three years of full-time relevant business experience and a high school diploma or the equivalent. To receive the ChFC designation candidates must successfully complete the eight required courses and agree to comply with The American College code of ethics and procedures. Participation in the annual Professional Recertification Program (PRP) is required to maintain the designation. ChFC® and Chartered Financial Consultant® are registered trademarks owned by the The American College. More information about the designation is available at <https://www.theamericancollege.edu>.

Item 3: Disciplinary Information

There are no legal or disciplinary events material to a client's or prospective client's evaluation of Dawn Torres-Gale.

Item 4: Other Business Activities

Dawn Torres-Gale is not actively engaged in any other investment-related business or occupation.

Dawn Torres-Gale is not actively engaged in any other business or occupation for compensation that provides a substantial source of income or involves a substantial amount of time.

Item 5: Additional Compensation

Dawn Torres-Gale does not receive any economic benefit from any third-party other than clients for providing advisory services. Such economic benefits are conveyed through Plancorp, LLC.

Item 6: Supervision

Dawn Torres-Gale is supervised and monitored by Derek Hartley, Chief Growth Officer, pursuant to Plancorp, LLC's written policies and procedures and code of ethics. Derek Hartley may be reached using the contact information on the cover page of this brochure supplement.



Item 1: Cover Page
ADV Part 2B: Brochure Supplement

February 27, 2026

8203 West Quinault Avenue, Suite 101
Kennewick, WA 99336
Tel: (509) 735-0484

This brochure supplement provides information about our investment professionals that supplements the Petersen Hastings Wealth Advisors, Inc. brochure.

You should have received a copy of that brochure. Please contact Diane Gaines, Chief Operations Officer & Chief Compliance Officer, at (509) 735-0484, if you did not receive Petersen Hastings Wealth Advisors, Inc. brochure or if you have any questions about the contents of this supplement.

Investment professionals included in this brochure supplement:

Cameron Ridgeway, CFP®

John Keyes, CFP®

Additional information about Petersen Hastings Wealth Advisors, Inc. and our investment professionals is also available on the SEC's website at www.advisorinfo.sec.gov.



Petersen Hastings Wealth Advisors, Inc.
ADV Part 2B Brochure Supplement

Item 1 – Cover Page

John Stirn Keyes

Petersen Hastings Wealth Advisors, Inc.

8203 West Quinault Avenue, Suite 101

Kennewick, WA 99336

(509) 735-0484

September 15, 2025

This Brochure Supplement provides information about John Stirn Keyes that supplements the Petersen Hastings Wealth Advisors, Inc. Brochure. You should have received a copy of that Brochure. Please contact Petersen Hastings at (509) 735-0484 if you did not receive our Brochure or if you have any questions about the contents of this supplement.

Additional information about John Keyes is available on the SEC's website at www.adviserinfo.sec.gov.

Petersen Hastings Wealth Advisors, Inc.
ADV Part 2B Brochure Supplement

Item 2 – Educational Background and Business Experience

John Stirn Keyes (Born in 1982)

Formal Education After High School

2005	Whitman College, B.A. degree Mathematics
------	------------------------------------------

Business Experience

10/20	Certified Financial Planner™ Licensee
02/20 to present	Wealth Advisor, Petersen Hastings Wealth Advisors, Inc.
07/16 to 12/19	Investment Professional, Cetera Investment Services, LLC
11/10 to 08/15	Relationship Manager, Fidelity Investments

Professional Designations

CFP® – Certified Financial Planner™

Mr. Keyes received the CFP® (Certified Financial Planner™) designation in October 2020.

The CFP® certification is a voluntary certification issued by the Certified Financial Planner Board of Standards, Inc. No federal or state law or regulation requires financial planners to hold CFP® 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® 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, administered in 10 hours over a two-day period, 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 in order to maintain the right to continue to use the CFP® designation:

Petersen Hastings Wealth Advisors, Inc.
ADV Part 2B Brochure Supplement

- 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.

Item 3- Disciplinary Information

We are required to disclose all material facts regarding any legal or disciplinary events that would be related to your evaluation of Mr. Keyes. Mr. Keyes has not been involved in any such events and therefore we have no information applicable to this Item to report.

Item 4- Other Business Activities

We are required to disclose certain information about certain outside business activities in which Mr. Keyes is actively engaged. Mr. Keyes is not engaged in any such activities and therefore we have no information applicable to this Item to report.

Item 5- Additional Compensation

We are required to disclose any economic benefit that someone who is not a client provides to Mr. Keyes for providing advisory services. Mr. Keyes does not receive any such economic benefits and therefore we have no information applicable to this Item to report.

Item 6 – Supervision

The Petersen Hastings Wealth Advisors, Inc. Investment Committee consults with and advises the officers and management of Petersen Hastings in establishing and managing investment strategies for client accounts in accordance with applicable laws, controlling documents, and the client's written Investment Policy Statement.

Petersen Hastings' investment adviser representatives and employees are required to adhere to the Petersen Hastings Compliance Manual in the performance of their daily activities and responsibilities to Petersen Hastings and you. Our Compliance Manual includes an overview of the various federal and state statutes and regulations governing Petersen Hastings' operations and our policies and procedures, which are designed to comply with applicable regulations and to facilitate the timeliness and quality of our compliance activities.

Ms. Diane Gains, CCO, is responsible for supervising Mr. Keyes's advisory activities on behalf of Petersen Hastings pursuant to its written compliance policies and procedures. If you have any questions or concerns about your account, you are asked to contact Ms. Gains by calling (509) 735-0484.

Item 7- Requirements for State-Registered Advisers

This Item is not applicable to us because we are registered with the U.S. Securities and Exchange Commission.

Petersen Hastings Wealth Advisors, Inc.
ADV Part 2B Brochure Supplement

Item 1 – Cover Page

Cameron James Ridgeway
Petersen Hastings Wealth Advisors, Inc.

8203 West Quinault Avenue, Suite 101

Kennewick, WA 99336

(509) 735-0484

September 15, 2025

This Brochure Supplement provides information about Cameron James Ridgeway that supplements the Petersen Hastings Wealth Advisors, Inc. Brochure. You should have received a copy of that Brochure. Please contact Petersen Hastings at (509) 735-0484 if you did not receive our Brochure or if you have any questions about the contents of this supplement.

Additional information about Cameron Ridgeway is available on the SEC's website at www.adviserinfo.sec.gov.

Petersen Hastings Wealth Advisors, Inc.
ADV Part 2B Brochure Supplement

Item 2 – Educational Background and Business Experience

Cameron James Ridgeway (Born in 1998)

Formal Education After High School

2020	Eastern Washington University, B.A. degree Finance
------	----------------------------------------------------

Business Experience

10/24 to Present	Wealth Advisor, Petersen Hastings Wealth Advisors, Inc.
07/20 – 09/24	Associate Wealth Advisor, Petersen Hastings Wealth Advisors, Inc.
06/19 – 09/19	Internship, Petersen Hastings Wealth Advisors, Inc.
06/17 – 09/17	Internship, Petersen Hastings Wealth Advisors, Inc.

Item 3- Disciplinary Information

We are required to disclose all material facts regarding any legal or disciplinary events that would be related to your evaluation of Mr. Ridgeway. Mr. Ridgeway has not been involved in any such events and therefore we have no information applicable to this Item to report.

Item 4- Other Business Activities

We are required to disclose certain information about certain outside business activities in which Mr. Ridgeway is actively engaged. Mr. Ridgeway is not engaged in any such activities and therefore we have no information applicable to this Item to report.

Item 5- Additional Compensation

We are required to disclose any economic benefit that someone who is not a client provides to Mr. Ridgeway for providing advisory services. Mr. Ridgeway does not receive any such economic benefits and therefore we have no information applicable to this Item to report.

Item 6 – Supervision

The Petersen Hastings Wealth Advisors, Inc. Investment Committee consults with and advises the officers and management of Petersen Hastings in establishing and managing investment strategies for client accounts in accordance with applicable laws, controlling documents, and the client’s written Investment Policy Statement.

Petersen Hastings’ investment adviser representatives and employees are required to adhere to the Petersen Hastings Compliance Manual in the performance of their daily activities and responsibilities to Petersen Hastings and you. Our Compliance Manual includes an overview of the various federal and state statutes and regulations governing Petersen Hastings’ operations and our policies and procedures, which are designed to comply with applicable regulations and to facilitate the timeliness and quality of our compliance activities.

Ms. Diane Gaines, CCO, is responsible for supervising Mr. Ridgeway’s advisory activities on behalf of Petersen Hastings pursuant to its written compliance policies and procedures. If you have any questions or concerns about your account, you are asked to contact Ms. Gaines by calling (509) 735-0484.

Petersen Hastings Wealth Advisors, Inc.
ADV Part 2B Brochure Supplement

Item 7- Requirements for State-Registered Advisers

This Item is not applicable to us because we are registered with the U.S. Securities and Exchange Commission.



**Shape the future
with confidence**

Item 1: Cover Page

ADV Part 2B: Brochure Supplement

February 24, 2026

200 Plaza Drive
Secaucus, NJ 07094
Phone: (800) 273-0588

www.ey.com/eynavigate

This brochure supplement provides information about our investment professionals that supplements the Ernst & Young LLP brochure.

You should have received a copy of that brochure. Please contact Raymond Echevarria, Chief Compliance Officer, at (800) 273-0588, if you did not receive Ernst & Young LLP's brochure or if you have any questions about the contents of this supplement.

Investment professionals included in this brochure supplement:

David Goss
Joshua Kantrowitz
Marc Mancuso
Tracey Breaux

Additional information about Ernst & Young LLP and our investment professionals is also available on the SEC's website at www.adviserinfo.sec.gov

Form ADV Part 2B Brochure Supplement

Ernst & Young Investment Advisers LLP

David Goss
Ernst & Young LLP
200 Plaza Drive
Secaucus, NJ 07094
Phone: (800) 273-0588

To the extent Ernst & Young LLP provides any investment planning services to you, such services will be performed under the supervision of Ernst & Young Investment Advisers LLP ("EYIA"), an affiliate of Ernst & Young LLP. EYIA is an investment adviser registered with the Securities and Exchange Commission under the Investment Advisers Act of 1940. A copy of EYIA's Form ADV Part 2 A ("brochure") can be obtained at no cost by calling 800-273-0588. **This brochure supplement provides information that supplements the EYIA brochure.**

Item 2 Educational Background and Business Experience

Year of Birth:
1978

Educational Background:
Ph.D. Music Education, University of Florida
MA Educational Leadership, Montclair State University
MM Music Performance, Rutgers University
BA Music Education, Montclair State University

Business Experience:
2021 - Present: Financial Planner - Ernst & Young LLP, Employee Financial Services
2016 - 2020: Exercise Specialist - Plus One an Optum Company
2010 - 2015: Doctoral Teaching Fellow - University of Florida

Item 3 Disciplinary Information: None

Item 4 Other Business Activities: None

Item 5 Additional Compensation: None

Item 6 Supervision: The representative is supervised by Raymond A. Echevarria, Chief Compliance Officer of Ernst & Young LLP. Any comments regarding the representative can be directed to him at (800) 273-0588.

Form ADV Part 2B Brochure Supplement

Ernst & Young Investment Advisers LLP

Joshua E. Kantrowitz
Ernst & Young LLP
200 Plaza Drive
Secaucus, NJ 07094
Phone: (800) 273-0588

To the extent Ernst & Young LLP provides any investment planning services to you, such services will be performed under the supervision of Ernst & Young Investment Advisers LLP ("EYIA"), an affiliate of Ernst & Young LLP. EYIA is an investment adviser registered with the Securities and Exchange Commission under the Investment Advisers Act of 1940. A copy of EYIA's Form ADV Part 2 A ("brochure") can be obtained at no cost by calling 800-273-0588. **This brochure supplement provides information that supplements the EYIA brochure.**

Item 2 Educational Background and Business Experience

Year of Birth:
1995

Educational Background:
Bachelor of Science, Financial Planning - William Paterson University (Cotsakos College of Business)

Business Experience:
2018 - Present: Financial Planner - Ernst & Young LLP, Employee Financial Services
2017 - 2018: Intern/Consultant - Withum Wealth Management
2017 - 2017: Student Program Supervisor - VITA Program
2016 - 2016: Income Tax Preparer - VITA Program

Item 3 Disciplinary Information: None

Item 4 Other Business Activities: None

Item 5 Additional Compensation: None

Item 6 Supervision: The representative is supervised by Raymond A Echevarria, Chief Compliance Officer of Ernst & Young LLP. Any comments regarding the representative can be directed to him at (800) 273-0588.

Form ADV Part 2B Brochure Supplement

Ernst & Young Investment Advisers LLP

Marc Mancuso
Ernst & Young LLP
200 Plaza Drive
Secaucus, NJ 07094
Phone: (800) 273-0588

To the extent Ernst & Young LLP provides any investment planning services to you, such services will be performed under the supervision of Ernst & Young Investment Advisers LLP ("EYIA"), an affiliate of Ernst & Young LLP. EYIA is an investment adviser registered with the Securities and Exchange Commission under the Investment Advisers Act of 1940. A copy of EYIA's Form ADV Part 2 A ("brochure") can be obtained at no cost by calling 800-273-0588. **This brochure supplement provides information that supplements the EYIA brochure.**

Item 2 Educational Background and Business Experience

Year of Birth:
1985

Educational Background:
B.A. in Economics from Fordham University

Business Experience
2009 - Present: Financial Planner - Ernst & Young LLP, Employee Financial Services
2007 - 2009: Financial Specialist - Wachovia Bank/ Wells Fargo

Professional Certification:
Certified Financial Planner (R) (CFP)

Please note that the following minimum qualifications are required to maintain the CFP designation:

General educational requirement: Candidates for certification must have a bachelor's degree (or higher), or its equivalent, in any discipline, from an accredited college or university in order to obtain CFP® certification.

Specific financial planning educational requirement: Must have knowledge of all of areas covered by the financial planning topic list including tax, estate, insurance, retirement and investment planning.

Successful completion of the CFP Certification Examination.

Experience requirements: A minimum of three years of full-time relevant personal financial planning experience.

Ongoing: CPE, Ethics, etc.: Must continue to maintain 30 CE credits biannually and adhere to CFP Board's Code of Ethics and Professional Responsibility, Rules of Conduct and Financial Planning Practice Standards, and acknowledge CFP Board's right to enforce them through its Disciplinary Rules and Procedures.

Item 3 Disciplinary Information: None

Item 4 Other Business Activities: None

Item 5 Additional Compensation: None

Item 6 Supervision: The representative is supervised by Raymond E Echevarria, Chief Compliance Officer of Ernst & Young LLP. Any comments regarding the representative can be directed to him at (800) 273-0588.

Form ADV Part 2B Brochure Supplement

Ernst & Young Investment Advisers LLP

Tracey Breaux
Ernst & Young LLP
200 Plaza Drive
Secaucus, NJ 07094
Phone: (800) 273-0588

To the extent Ernst & Young LLP provides any investment planning services to you, such services will be performed under the supervision of Ernst & Young Investment Advisers LLP ("EYIA"), an affiliate of Ernst & Young LLP. EYIA is an investment adviser registered with the Securities and Exchange Commission under the Investment Advisers Act of 1940. A copy of EYIA's Form ADV Part 2 A ("brochure") can be obtained at no cost by calling 800-273-0588. **This brochure supplement provides information about [Name] that supplements the EYIA brochure.**

Item 2 Educational Background and Business Experience

Year of Birth:
1972

Educational Background:
Bachelor of Science, Business/ Management from Nova Southeastern University

Business Experience:
2022 - Present: Financial Planner - Ernst & Young LLP, Employee Financial Services
2022: CCO/Financial Guide - Fruitful
2021 - 2022: Financial Planner - Origin Financial
2012 - 2019: Financial Planner - Charles Schwab & Co., Inc.
2011-2012: Wealth Management Specialist - USAA Financial Advisors, Inc.
2009 - 2011: Financial Advisors - Merrill Lynch, Pierce, Fenner & Smith Incorporated

Professional Certification:
Certified Financial Planner (R) (CFP)

Please note that the following minimum qualifications are required to maintain the CFP designation:

General educational requirement: Candidates for certification must have a bachelor's degree (or higher), or its equivalent, in any discipline, from an accredited college or university in order to obtain CFP® certification.

Specific financial planning educational requirement: Must have knowledge of all of areas covered by the financial planning topic list including tax, estate, insurance, retirement and investment planning.

Successful completion of the CFP Certification Examination.

Experience requirements: A minimum of three years of full-time relevant personal financial planning experience.

Ongoing: CPE, Ethics, etc.: Must continue to maintain 30 CE credits biannually and adhere to CFP Board's Code of Ethics and Professional Responsibility, Rules of Conduct and Financial Planning Practice Standards, and acknowledge CFP Board's right to enforce them through its Disciplinary Rules and Procedures.

Item 3 Disciplinary Information: None

Item 4 Other Business Activities: None

Item 5 Additional Compensation: None

Item 6 Supervision: The representative is supervised by Raymond A. Echevarria, Compliance Officer of Ernst & Young LLP. Any comments regarding the representative can be directed to him at (800) 273-0588.