# Andrew (Andy) Nicholas Coyne

Executive Director, Financial Planning

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This is a supplement to the Financial Engines Advisors, L.L.C. brochure. This supplement describes advisory services provided by Financial Engines Advisors L.L.C. also referred to as Edelman Financial Engines. Please contact us at (833) 752-6333 if you have any questions about our brochure or this supplement.

## Educational Background and Experience

**Year of Birth:** 1969

**Formal Education:** Bachelor of Science in Business Management: Finance, University of Maryland Global Campus

**Business Background:** Andy has been with Edelman Financial Engines since 2015.

**Employment History:**

- **2021 - Present:** Executive Director, Financial Planning at Edelman Financial Engines
- **2015 - 2021:** Director, Financial Planning at Edelman Financial Engines
- **1998 - 2015:** Vice President, Financial Consultant at Charles Schwab
- **1996 - 1998:** Registered Representative at Morgan Stanley

**Professional Designation(s):** Accredited Asset Management Specialist™

## Disciplinary Information

Like all Registered Investment Advisors, we are required to disclose all material facts regarding any legal or disciplinary events that could materially influence your evaluation of your advisor.

Andy has no legal or disciplinary events to report.

## Other Business-Related Activities

There is no other business activity to report.

## Additional Compensation

Andy may receive additional compensation from the Firm for providing advisory services in limited circumstances, such as when new accounts are opened due to referrals from current clients or for increasing certain types of clients who hold accounts at the firm. Andy receives no economic benefit for providing advisory services from any third parties.

## Supervision

Andy is supervised by Amin Dabit, Senior Vice President, Traditional Wealth Planning and his team, who can be reached at (720) 954-1967. Supervision is conducted in a variety of ways, including face to face meetings, telephone calls and the review of activity reports.

Important Information About the Accredited Asset Management Specialist™, AAMS™ Designation: The AAMS™ provides the advisor with a logical progression of topics, enabling them to think in terms of clients' total financial situations, not just their investments. At the conclusion of the studies, the candidate's ability to identify opportunities and employ strategies is enhanced not only with regard to investments, but also related to planning for insurance, tax, retirement, and estate issues. There is no prerequisite. The candidate must complete a self-study course consisting of 12 modules, requiring 100-120 hours. The candidate must also pass a final exam (online, closed-book, proctored). The candidate is required to complete 16 hours of continuing education every two years.