Edelman Financial Engines™

Chad Ashton Kasper

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: 1975

Formal Education: Bachelor of Arts in Communications, University of St. Thomas

Business Background: Chad has been with Edelman Financial Engines since 2016.

Employment History:

- **2025 - Present:** Executive Director, Financial Planning at Edelman Financial Engines
- **2016 - 2025:** Director, Financial Planning at Edelman Financial Engines
- **2016 - 2016:** Senior Vice President-Financial Planning at Financial Engines Advisor Center, LLC
- **2010 - 2016:** Education & Enrollment Specialist, Registered Representative at Prudential Insurance Company of America

Professional Designation(s): Chartered Retirement Planning Counselor™, Chartered Special Needs Consultant®

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.

Chad has no legal or disciplinary events to report.

Other Business-Related Activities

There is no other business activity to report.

Additional Compensation

Chad 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. Chad receives no economic benefit for providing advisory services from any third parties.

Supervision

Chad 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 Chartered Retirement Planning Counselor™, CRPC™ Designation: The CRPC™ program is issued by the College for Financial Planning and focuses on a course of study encompassing pre- and post-retirement needs and issues related to asset management and estate planning. Although the CRPC™ program requires no prerequisites, Candidates must complete a final designation exam that is online, closed-book and proctored. Additionally, Candidates must complete 16 hours of continuing education every two years.

Important Information About the Chartered Special Needs Consultant® (ChSNC®) Designation: The Chartered Special Needs Consultant® (ChSNC®) designation prepares financial professionals to address issues important to those requiring special needs financial planning. The ChSNC® designation is made available through the American College of Financial Services and candidates must: (1) successfully complete the three required courses, (2) agree to comply with The American College Code of Ethics and Procedures, (3) have at least five years of professional experience in financial services or the practice of law (with a focus on income tax and/or estate planning), OR (4) have four years of relevant professional financial services experience and an undergraduate\degree from a regionally accredited institution. Participation in the annual Professional Recertification Program is required to maintain the designation.