Craig Elbert Loewenstein

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: 1977

Formal Education: Master of Arts in Psychology, University of the Rockies
Bachelor of Science in Business Management, Colorado Technical University

Business Background: Craig has been with Edelman Financial Engines since 2026.

Employment History:

- **2026 - Present:** Director, Financial Planning at Edelman Financial Engines
- **2016 - 2026:** VP, Branch Manager at Charles Schwab
- **2011 - 2016:** Associated Person at Waddell & Reed
- **2008 - 2011:** Financial Advisor at Edward Jones

Professional Designation(s): Certified Wealth Strategist®

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.

Craig has no legal or disciplinary events to report.

Other Business-Related Activities

There is no other business activity to report.

Additional Compensation

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

Supervision

Craig 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 Certified Wealth Strategist® (CWS®) Designation: The Certified Wealth Strategist® (CWS®) mission is to provide financial services professionals with the technical knowledge, the practice management formula, and the critical client interaction skills to create and build a dynamic Wealth Advisory practice that works effectively with more complex client issues. Candidates must have 3+ years experience in the financial services industry and must have significant experience in a client-facing role, or a 4-year degree from an accredited school. The candidate must complete a multi-step process with both instructor led and self-study 6-month program. The candidate is required to complete 33 (30 General and 3 Ethical) hours of continuing education every two years.