



## **Curtis W. Hagner**

Director, Financial Planning

3945 Freedom Circle  
Suite 450  
Santa Clara, CA 95054  
(408) 970-0555

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:** 1961

**Formal Education:** Studied Manufacturing Engineering, DeAnza Community College

**Business Background:** Curtis has been with Edelman Financial Engines since 2013.

**Employment History:**

- **2018 - Present:** Director, Financial Planning at Edelman Financial Engines
- **2013 - 2018:** Senior Investment Advisor Representative at Financial Engines Advisors LLC
- **2012 - 2013:** Financial Advisor at Merrill Edge

### **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.

Curtis has no legal or disciplinary events to report.

### **Other Business-Related Activities**

There is no other business activity to report.

## Additional Compensation

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

## Supervision

Curtis 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.