Douglas (Doug) B. Custer

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: 1963

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

Business Background: Doug has been with Edelman Financial Engines since 2021.

Employment History:

- **2025 - Present:** Executive Director, Financial Planning at Edelman Financial Engines
- **2021 - 2025:** Director, Financial Planning at Edelman Financial Engines
- **2017 - 2021:** Financial Advisor at Viridian Advisors
- **2011 - 2017:** Director - Wealth Management at Appropriate Balance Financial Services (ABFS)
- **1996 - 2011:** Vice President - Financial Consultant at Charles Schwab and Co.
- **1993 - 1996:** Financial Consultant at Wheat First Butcher Singer

Professional Designation(s): CERTIFIED FINANCIAL PLANNER®, Chartered Advisor in Philanthropy®

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.

Doug has no legal or disciplinary events to report.

Other Business-Related Activities

There is no other business activity to report.

Additional Compensation

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

Supervision

Doug 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 FINANCIAL PLANNER® (CFP®) Designation: Those with the CFP® certification have demonstrated competency in all areas of finance related to financial planning. Candidates for the CFP® mark must pass a certification exam administered by the Certified Financial Planner Board of Standards, Inc. that focuses on more than 100 topics of concern to the financial planning field. In addition to passing the CFP® exam, candidates must also complete qualifying work experience and agree to the CFP Board's Standards and Policies, which include CFP® Certification Requirements, Code of Ethics and Standards of Conduct, Fitness Standards for Candidates and Professionals Eligible for Reinstatement, Procedural Rules, Guide to Use of the CFP® Certification Marks, and Privacy Policy. Finally, certified CFP® professionals must complete 30 hours of continuing education every two years. Certified Financial Planner Board of Standards Inc. owns the marks CFP® certification and CERTIFIED FINANCIAL PLANNER® certification in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Important Information About the Chartered Advisor in Philanthropy® (CAP®) Designation: The CAP® designation provides graduates the tools and knowledge to assist individuals or families in the development and implementation of philanthropic programs, allowing clients to reach their charitable giving objectives while also helping them meet their estate planning and wealth management goals. Candidates for the CAP® designation must have at least three years of experience in financial planning or a related profession, and must complete a minimum of three courses in philanthropic studies at the Irwin Graduate School and must pass a two-hour rigorous, supervised written examination after each course for a total of six hours of examination. The curriculum addresses the advanced design, implementation and management of charitable gifts techniques and strategies, as well as philanthropic tools including charitable trusts, private foundations, supporting organizations, donor-advised funds, pooled income funds and charitable gift annuities. Candidates must also agree to comply with The American College Code of Ethics and Procedures. Designees must complete continuing education every two years and participate in the annual Professional Recertification Program (PRP) to maintain the designation.