



Gian Cristoffer Mariano Deguzman

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: 1986

Formal Education: Bachelor degree in Communication, George Mason University

Business Background: Gian has been with Edelman Financial Engines since 2018.

Employment History:

- **2018 - Present:** Director, Financial Planning at Edelman Financial Engines
- **2017 - 2018:** Branch Manager at Scottrade, Inc
- **2016 - 2017:** Wealth Management Advisor at TIAA-CREF Individual & Institutional Services, LLC
- **2013 - 2016:** Investment Consultant at TD Ameritrade, Inc
- **2011 - 2013:** Licensed Banker at Wells Fargo Bank

Professional Designation(s): Chartered Retirement Planning Counselor™, Chartered Financial Consultant®, 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.

Gian has no legal or disciplinary events to report.

Other Business-Related Activities

There is no other business activity to report.

Additional Compensation

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

Supervision

Gian 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 Financial Consultant® (ChFC®) Designation: The ChFC® program prepares candidates to meet the advanced financial planning needs of individuals, professionals and small business owners. Candidates gain a sustainable advantage in this competitive field with in-depth coverage of the key financial planning disciplines, including insurance, income taxation, retirement planning, investments and estate planning. Candidates are required to have three years of full-time business experience within the five years preceding the awarding of the designation and pass a final proctored exam for each course. In addition, the Charter Financial Consultant® must complete 30 hours of continuing education every two years.

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.