



Jack Isaac London

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: 1962

Formal Education: Bachelor of Science in Psychology, Tufts University
Master of Business Administration, Babson College

Business Background: Jack has been with Edelman Financial Engines since 2011.

Employment History:

- **2021 - Present:** Executive Director, Financial Planning at Edelman Financial Engines
- **2011 - 2021:** Director, Financial Planning at Edelman Financial Engines
- **2009 - 2011:** Financial Planner at MassMutual Financial Group
- **2003 - 2009:** Registered Representative at Equity Services, Inc
- **2000 - 2003:** Registered Representative at Jefferson Pilot Securities Corp
- **1993 - 2011:** Principal at London Financial Services

Professional Designation(s): Chartered Financial Consultant®, Chartered Life Underwriter®, Qualified Financial Planner

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.

Jack has no legal or disciplinary events to report.

Other Business-Related Activities

There is no other business activity to report.

Additional Compensation

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

Supervision

Jack 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 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 Chartered Life Underwriter® (CLU®) Designation: The CLU® designation provides candidates with in-depth knowledge on the insurance needs of individuals, business owners and professional clients. Candidates are required to have three years of full-time business experience within the five years preceding the awarding of the designation and successfully pass a final proctored exam for each course. In addition, a Chartered Life Underwriter® must complete 30 hours of continuing education every two years.

Important Information About the Qualified Financial Planner (QFP) Designation: Candidates must have a minimum of three years experience in the field of Financial Planning and hold one or more of the following designations: Chartered Financial Consultant® (ChFC®), CERTIFIED FINANCIAL PLANNER™ (CFP®), Master of Science with a Financial Planning concentration (MS), Master of Science in Financial Services with a Financial Planning concentration (MSFS) or Personal Financial Specialist (PFS). Examination type varies according to the designations listed above. In addition, a Qualified Financial Planner must complete 30 hours of continuing education every two years, or 15 hours annually.