Edelman Financial Engines™



Jerome (JB) Bruce Liebstein

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: 1961

Formal Education: Attended University of Maryland
Attended West Virginia University

Business Background: JB has been with Edelman Financial Engines since 2006.

Employment History:

- **2006 - Present:** Executive Director, Financial Planning at Edelman Financial Engines
- **2002 - 2006:** Registered Representative at Next Financial Group
- **1997 - 2001:** Registered Representative at Lincoln Financial Group
- **1996 - 1997:** Registered Representative at Cigna Financial Group

Professional Designation(s): CERTIFIED FINANCIAL PLANNER®, Chartered Financial Consultant®, Retirement Income Certified Professional®

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.

JB has no legal or disciplinary events to report.

Other Business-Related Activities

There is no other business activity to report.

Additional Compensation

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

Supervision

JB is supervised by Ro Mehrotra, Senior Vice President, Wealth Client and his team, who can be reached at (201) 431-5005. 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 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 Retirement Income Certified Professional® (RICP®) Designation: The RICP® program is designed to provide education to the next generation of retirement income planning experts. Retirement income planning places the focus on transitioning from asset accumulation to creating a sustainable livelihood for clients in retirement. Candidates must successfully complete 1) all three courses which includes extensive video lectures, expert interviews, practice exams, assessment questions, and professor-driven webinars. Each of the three courses concludes with a two-hour 100-question exam. 2) meet experience requirements, and 3) agree to comply with The American College Code of Ethics and Procedures. Additionally, the candidate is required to complete 30 hours of CE every two years, including at least one hour of ethics.