



Jeffrey (Jeff) James Dietz

Senior Financial Planner

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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 of Arts in Political Science, Brown University

Business Background: Jeff has been with Edelman Financial Engines since 2025.

Employment History:

- **2025 - Present:** Senior Financial Planner at Edelman Financial Engines
- **2022 - 2025:** Vice President at Fisher Investments
- **2019 - 2022:** Vice President at JP Morgan Chase
- **2013 - 2019:** Vice President at Merrill Lynch
- **2011 - 2013:** Financial Representative at Fidelity Investments

Professional Designation(s): Chartered Financial Analyst®

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.

Jeff has no legal or disciplinary events to report.

Other Business-Related Activities

There is no other business activity to report.

Additional Compensation

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

Supervision

Jeff 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 Analyst® (CFA®) Designation: The CFA® designation is highly revered in the investment management field and those who have the credential are expected to have an in-depth knowledge of the investment industry, with many going on to careers as portfolio managers or research analysts at hedge funds and private equity firms. Obtaining the qualification requires a self-study program, which takes several years to complete, and participants must pass three six-hour exams, as well as agree to abide by a strict code of ethics and standards of conduct. The candidate must also meet one of the following requirements: undergraduate degree and four years of professional experience involving investment decision-making, or four years of qualified work experience (full time, but not necessarily investment related).