Jonathan Michael Saxon

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: 1978

Formal Education: Bachelor of Arts in Biology, St. Mary's College
Master of Business Administration, Loyola College in Maryland

Business Background: Jonathan has been with Edelman Financial Engines since 2010.

Employment History:

- **2010 - Present:** Director, Financial Planning at Edelman Financial Engines
- **2007 - 2010:** Account Executive at Fidelity Investments
- **2004 - 2007:** Manager at Ameriprise Financial

Professional Designation(s): Registered Financial Consultant®

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.

Jonathan has no legal or disciplinary events to report.

Other Business-Related Activities

There is no other business activity to report.

Additional Compensation

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

Supervision

Jonathan 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 Registered Financial Consultant (RFC®) Designation: The RFC® is a professional designation awarded by the International Association of Registered Financial Consultants (IARFC) to those financial advisors who meet high standards of education, experience and integrity. Candidates must meet the following requirements: (1) undergraduate or graduate degree in business, finance, economics or a related field, or have earned one of the following designations: AAMS, CFA, CFP, ChFC, CLU, CPA, EA, JD, LUTCF; (2) Series 65, Series 6 & 63, Series 7 & 63 or Series 7 & 66 securities licenses and a life insurance license; and (3) four years of full-time experience as a financial planning practitioner in the field of financial planning or financial services. In addition, candidates must complete 40 hours of continuing education per year in personal finance and professional practice management and four hours of ethics every two years.