



Kay Lee Russell

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: 1969

Formal Education: Bachelor of Arts in Communications, George Mason University

Business Background: Kay has been with Edelman Financial Engines since 2021.

Employment History:

- **2021 - Present:** Director, Financial Planning at Edelman Financial Engines
- **2014 - 2021:** Senior Financial Consultant at TD Ameritrade
- **2008 - 2014:** Financial Consultant at Charles Schwab & Company

Professional Designation(s): Accredited Asset Management Specialist™

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.

Kay has no legal or disciplinary events to report.

Other Business-Related Activities

There is no other business activity to report.

Additional Compensation

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

Supervision

Kay 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 Accredited Asset Management Specialist™, AAMS™ Designation: The AAMS™ provides the advisor with a logical progression of topics, enabling them to think in terms of clients' total financial situations, not just their investments. At the conclusion of the studies, the candidate's ability to identify opportunities and employ strategies is enhanced not only with regard to investments, but also related to planning for insurance, tax, retirement, and estate issues. There is no prerequisite. The candidate must complete a self-study course consisting of 12 modules, requiring 100-120 hours. The candidate must also pass a final exam (online, closed-book, proctored). The candidate is required to complete 16 hours of continuing education every two years.