



## Kevin Joseph Maguire

Executive Director, Financial Planning

10 Bank Street  
Suite 1215  
White Plains, NY 10606  
(914) 824-1523

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:** 1960

**Formal Education:** Bachelor of Science in Marketing and Management, Siena College

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

#### Employment History:

- **2025 - Present:** Executive Director, Financial Planning at Edelman Financial Engines
- **2011 - 2025:** Director, Financial Planning at Edelman Financial Engines
- **2008 - 2011:** Financial Advisor at Key Investment Services
- **2006 - 2008:** Vice President of Investments at Chase Investment Services
- **1995 - 2006:** Financial Advisor at BNY Investment Center
- **1991 - 1995:** Financial Advisor at Chemical Investment Services
- **1987 - 1991:** Financial Advisor at Dean Witter Reynolds

**Professional Designation(s):** Chartered Mutual Fund Counselor™, Chartered Retirement Planning Counselor™, Registered Financial Consultant®, Certified in Blockchain and Digital Assets<sup>SM</sup>

### 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.

Kevin has no legal or disciplinary events to report.

### Other Business-Related Activities

There is no other business activity to report.

## Additional Compensation

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

## Supervision

Kevin 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 Mutual Fund Counselor™, CMFC™ Designation: The CMFC™ provides candidates with a thorough knowledge of mutual funds and their various uses as investment vehicles. The case studies used throughout the course—presenting client scenarios and pointing out opportunities for candidates to make the most of these popular investments—provide insight into effective use of these investment vehicles. There is no prerequisite or experience required for this designation. Candidates must pass a final designation exam which is online, closed-book and proctored. In addition, a Chartered Mutual Fund Counselor™ must complete 16 hours of continuing education every two years.

Important Information About the Chartered Retirement Planning Counselor™, CRPC™ Designation: The CRPC™ program is issued by the College for Financial Planning and focuses on a course of study encompassing pre- and post-retirement needs and issues related to asset management and estate planning. Although the CRPC™ program requires no prerequisites, Candidates must complete a final designation exam that is online, closed-book and proctored. Additionally, Candidates must complete 16 hours of continuing education every two years.

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.

Important Information About the Certified in Blockchain and Digital Assets<sup>SM</sup> (CBDA<sup>SM</sup>) Designation: The Certified in Blockchain and Digital Assets<sup>SM</sup> (CBDA<sup>SM</sup>) designation is an online self-study program that provides financial professionals with essential knowledge and understanding of blockchain and digital assets, enabling them to advise clients on this asset class. The CBDA<sup>SM</sup> designation is offered through the Digital Assets Council of Financial Professionals and candidates must achieve a score of 70% or higher on all modules to pass the designation program. After one year, designation holders are required to take an Update Course and pay a renewal fee to be able to continue using the CBDA<sup>SM</sup> Designation.