Edelman Financial Engines

Kevin James Yorkey

Executive Director, Financial Planning

25 Burlington Mall Road
Suite 405
Burlington, MA 01803
(781) 328-0671

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: 1977

Formal Education: Bachelor of Business Administration, University of Massachusetts at Amherst
Master of Science in Investment Management, Boston University

Business Background: Kevin has been with Edelman Financial Engines since 2012.

Employment History:

- **2025 - Present:** Executive Director, Financial Planning at Edelman Financial Engines
- **2012 - 2025:** Director, Financial Planning at Edelman Financial Engines
- **2012 - 2012:** SVP Equity Sales at Capstone Investments
- **2006 - 2011:** VP Equity Sales at FBR Capital Markets
- **1999 - 2006:** Financial Planning Consultant 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.

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 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).