



Kurt S. Costa

Director, Financial Planning

317 Iron Horse Way
Suite 201
Providence, RI 02908
(401) 210-9762

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: 1987

Formal Education: Bachelor of Business Administration in Finance, University of Massachusetts, Amherst

Business Background: Kurt has been with Edelman Financial Engines since 2023.

Employment History:

- **2025 - Present:** Director, Financial Planning at Edelman Financial Engines
- **2023 - 2025:** Senior Manager, Pension Plan Client Services at Edelman Financial Engines
- **2018 - 2023:** Director of Private Client Services at New England Pension Plan Systems
- **2017 - 2018:** Senior Financial Consultant at TD Ameritrade
- **2013 - 2017:** Associate Financial Consultant at Charles Schwab & Co., Inc.
- **2010 - 2013:** Fund Accountant at Brown Brothers Harriman & Co.

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.

Kurt has no legal or disciplinary events to report.

Other Business-Related Activities

There is no other business activity to report.

Additional Compensation

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

Supervision

Kurt 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.