Edelman Financial Engines™



Michael Paul Jergens

Director, Financial Planning

201 West Big Beaver Road, The Columbia Center
Suite 950
Troy, MI 48084
(248) 581-3078

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: 1979

Formal Education: Attended Ohio State University

Business Background: Michael has been with Edelman Financial Engines since 2022.

Employment History:

- **2022 - Present:** Director, Financial Planning at Edelman Financial Engines
- **2018 - 2022:** Owner at Phoenix Garage, LLC
- **2016 - 2018:** Technical Sales Representative at Woodland Direct, Inc.
- **2015 - 2015:** Private Client Advisor at JP Morgan Bank, NA.
- **2014 - 2015:** Managing Partner at Millennium Wealth Management
- **2011 - 2014:** Senior Financial Advisor at Merrill Lynch Wealth Management
- **2009 - 2011:** Financial Advisor-Vice President of Investments at Chase Investment Services
- **2004 - 2009:** Financial Planning Consultant at Fidelity Investments

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.

Michael has no legal or disciplinary events to report.

Other Business-Related Activities

There is no other business activity to report.

Additional Compensation

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

Supervision

Michael 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.