

Reese Harper, CFP[®], ChFC[®], CLU[®]

**Aquire Wealth Advisors, LLC
d/b/a: Dentist Advisors**

**879 Baxter Drive
South Jordan, UT 84095**

**Telephone: 801-748-1243
Facsimile: 801-454-0434**

February 26, 2022

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Reese Harper that supplements the Dentist Advisors brochure. You should have received a copy of that brochure. Contact us at 801-748-1243 if you did not receive Dentist Advisors's brochure or if you have any questions about the contents of this supplement.

Additional information about Reese Harper is available on the SEC's website at www.adviserinfo.sec.gov. Mr. Harper's IARD # is 4907910.

Item 2 Educational Background and Business Experience

Reese Harper

Year of Birth: 1982

Formal Education After High School:

- University of Utah, Masters in Finance, 2018
- Brigham Young University, BA, Music, 2008

Business Background:

- Chief Executive Officer and Investment Adviser Representative, Aquire Wealth Advisors, LLC, d/b/a Dentist Advisors, 2/2009 - Present.
- Principal and Stockholder, Aquire Wealth Advisors, LLC, d/b/a Dentist Advisors, 11/2007 - Present

Certifications: **CFP**, **ChFC**, **CLU**

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP® (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 63,000 individuals have obtained CFP® certification in the United States. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education - Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination - Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience - Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics - Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education - Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics - Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a

fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Chartered Financial Consultant® (ChFC®) - This designation is issued by The American College and is granted to individuals who have at least three years of full-time business experience within the five years preceding the awarding of the designation. The candidate is required to take seven mandatory courses which include the following disciplines: financial, insurance, retirement and estate planning; income taxation, investments and application of financial planning; as well as two elective courses involving the application of the aforementioned disciplines. Each course has a final proctored exam and once issued, the individual is required to submit 30 hours of continuing education every two years.

Chartered Life Underwriter® (CLU®)

This designation is issued by The American College and is granted to individuals who have at least three years of full-time business experience within the five years preceding the awarding of the designation. The candidate is required to take a series of mandatory courses which include, for example, the following: insurance planning, life insurance law, fundamentals of estate planning, planning for business owners, income taxation, group benefits, planning for retirement needs, and investments. Each course has a final proctored exam and once issued, the individual is required to submit 30 hours of continuing education every two years.

Item 3 Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4 Other Business Activities

Reese Harper provides financial consulting services, serves as a keynote or other speaker, and provides other consulting services which he promotes at in-person events and through reeseharper.com and other social medias sites. These services are generally complementary to, rather than competitive with, the services provided by Dentist Advisors. Clients of Dentist Advisors are neither required nor expected to engage Mr. Harper for any separate services; any such engagement would be at the request of the client. However, clients should be aware that Mr. Harper's decision to accept individual client engagements is always at his discretion, as time and other obligations permit. Engagements for investment management, financial planning, or other services requiring registration as an investment adviser are provided pursuant to an engagement through Dentist Advisors, not with Mr. Harper directly.

In the event a client and Mr. Harper mutually agree to proceed with a direct engagement, the parties must agree on the services to be provided and the fees and rate Mr. Harper will charge for the specific services the client has requested. Engagements will be made pursuant to a written Consulting Agreement.

Clients are advised that a conflict of interest exists because the compensation to be received by Mr. Harper for providing non-advisory direct services is in addition to the compensation to be received in connection with the compensation to be received by Mr. Harper pursuant to the client's agreement with Dentist Advisors, and as a result, Mr. Harper has an economic interest to recommend such direct services based on the compensation to be received, rather than based solely on the client's needs.

Mr. Harper is the CEO of Elements Technology, Inc. ("Elements"), a software firm. Elements is an application for financial planning that is used with clients of Dentist Advisors and made available to other financial advisors that wish to purchase the program for use with their clients. Use of Elements with clients of Dentist Advisors creates a conflict of interest because it is a new financial planning program that is not widely used in the industry. It may have different parameters within its algorithms and financial planning assumptions than other more widely known financial planning programs.

Clients are under no obligation, contractually or otherwise, to engage Mr. Harper for direct services or otherwise implement or act upon Mr. Harper's recommendations. Clients retain the absolute right to decide whether or not to act on such recommendations, and if they choose to act on such recommendations.

Mr. Harper is licensed as an independent insurance agent, and maintains this license so that he may provide clients with advice regarding various insurance topics. However, Mr. Harper does not sell any insurance products and, does not receive any compensation from the sale of insurance products.

Mr. Harper is also a mentor for students at BYU Associate Entrepreneurs Founders Organization in the undergraduate and graduate business programs. Mr. Harper's duties as a Mentor for BYU Associate Entrepreneurs Founders Organization do not create a conflict of interest to his provision of advisory services through Dentist Advisors.

Item 5 Additional Compensation

Refer to the *Other Business Activities* section above for disclosures on Mr. Harper's receipt of additional compensation as a result of his other business activities.

Also, refer to the *Fees and Compensation, Client Referrals and Other Compensation, and Other Financial Industry Activities and Affiliations* section(s) of Dentist Advisors's firm brochure for additional disclosures on this topic.

Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Dentist Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Justin Copier, Chief Compliance Officer

Supervisor phone number: 801-748-1243

Matthew Mulcock, CFP®
Aquire Wealth Advisors, LLC
d/b/a: Dentist Advisors

**879 Baxter Drive
South Jordan, UT 84095**

**Telephone: 801-748-1243
Facsimile: 801-454-0434**

September 17, 2021

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Matthew Mulcock that supplements the Dentist Advisors brochure. You should have received a copy of that brochure. Contact us at 801-748-1243 if you did not receive Dentist Advisors's brochure or if you have any questions about the contents of this supplement.

Additional information about Matthew Mulcock (CRD # 6185404) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Matthew Mulcock, CFP

Year of Birth: 1986

Formal Education After High School:

- Utah Valley University, BS, Communication, 12/2012

Business Background:

- Aquire Wealth Advisors, LLC d/b/a Dentist Advisors, Investment Adviser Representative, 4/2018 - Present
- Fidelity Investments, Financial Representative, 4/2013 - 2/2018
- Catania LLC, Real Estate/ Project Manager, 6/2011 - 12/2012

Certifications: **CFP**

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The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 71,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services

at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Matthew Mulcock has no required disclosures under this item.

Item 4 Other Business Activities

Matthew Mulcock is not actively engaged in any other business or occupation (investment-related or otherwise) beyond his capacity as Investment Adviser Representative of Dentist Advisors. Moreover, Mr. Mulcock does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

Item 5 Additional Compensation

Matthew Mulcock does not receive any additional compensation beyond that received as an Investment Adviser Representative of Dentist Advisors.

Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Dentist Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Justin Copier, Chief Compliance Officer

Supervisor phone number: 801-748-1243

Ryan Isaac, CFP®

San Clemente, CA, 92673

Telephone: 949-616-4781

**Aquire Wealth Advisors, LLC
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February 10, 2022

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Ryan Isaac that supplements the Dentist Advisors brochure. You should have received a copy of that brochure. Contact us at 801-748-1243 if you did not receive Dentist Advisors's brochure or if you have any questions about the contents of this supplement.

Additional information about Ryan Isaac is available on the SEC's website at www.adviserinfo.sec.gov. Mr. Isaac's IARD # is 5858393

Item 2 Educational Background and Business Experience

Ryan Isaac

Year of Birth: 1980

Formal Education After High School:

- Westminster College, BS, Business, 2012

Business Background:

- Investment Advisor Representative, Aquire Wealth Advisors, LLC d/b/a Dentist Advisors, 01/2011 - Present
- Paraplanner and Business Development, Aquire Wealth Advisors, LLC d/b/a Dentist Advisors, 11/2008 - Present

Certifications: CFP

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To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*.

The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Item 3 Disciplinary Information

Registered investment advisors are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4 Other Business Activities

Ryan Isaac is not actively engaged in any other business or occupation (investment-related or otherwise) beyond his capacity as an Investment Advisor Representative. Moreover, Mr. Isaac does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

Item 5 Additional Compensation

Ryan Isaac does not receive any additional compensation beyond that received as an Investment Advisor Representative.

Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Dentist Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Justin Copier, Chief Compliance Officer

Supervisor phone number: 801-748-1243

William West Gochnour
Aquire Wealth Advisors, LLC
d/b/a: Dentist Advisors

879 Baxter Drive
South Jordan, UT 84095

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Facsimile: 801-454-0434

September 17, 2021

FORM ADV PART 2B
BROCHURE SUPPLEMENT

This brochure supplement provides information about William West Gochnour that supplements the Dentist Advisors brochure. You should have received a copy of that brochure. Contact us at 801-748-1243 if you did not receive Dentist Advisors's brochure or if you have any questions about the contents of this supplement.

Additional information about William West Gochnour (CRD # 6908924) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

William West Gochnour

Year of Birth: 1991

Formal Education After High School:

- University of Utah, BA, Spanish, 2015

Business Background:

- Acquire Wealth Advisors, LLC d/b/a Dentist Advisors, Investment Adviser Representative, 2/2018 - Present
- Acquire Wealth Advisors, LLC d/b/a Dentist Advisors, Associate Adviser, 2/2018 - 10/2019
- Orca Health, Director of Provider Development, 6/2015 - 2/2018
- Curza, Research Assistant, 10/2013 - 6/2015
- University of Utah, Department of Chemistry, Teaching Assistant, 9/2012 - 12/2014

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. William West Gochnour has no required disclosures under this item.

Item 4 Other Business Activities

William West Gochnour is not actively engaged in any other business or occupation (investment-related or otherwise) beyond his capacity as Investment Adviser Representative of Dentist Advisors. Moreover, Mr. Gochnour does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

Item 5 Additional Compensation

William West Gochnour does not receive any additional compensation beyond that received as an Investment Adviser Representative of Dentist Advisors.

Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Dentist Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Justin Copier, Chief Compliance Officer

Supervisor phone number: 801-748-1243

Jake Elm, CFP®

**Aquire Wealth Advisors, LLC
d/b/a: Dentist Advisors**

**879 Baxter Drive
South Jordan, UT 84095**

**Telephone: 801-748-1243
Facsimile: 801-454-0434**

September 17, 2021

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Jake Elm that supplements the Dentist Advisors brochure. You should have received a copy of that brochure. Contact us at 801-748-1243 if you did not receive Dentist Advisors's brochure or if you have any questions about the contents of this supplement.

Additional information about Jake Elm (CRD # 7199936) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Jake Elm, CFP

Year of Birth: 1994

Formal Education After High School:

- Utah Valley University, BS Personal Financial Planning, 2019

Business Background:

- Aquire Wealth Advisors, LLC d/b/a Dentist Advisors, Associate Adviser, 8/2018 - Present; Investment Adviser Representative 11/2019 - Present
- Utah Valley University, Full Time Student, 8/2015 - 5/2019
- La Jolla Groves, Server, 6/2016 - 10/2018
- Boostability, Fulfillment Specialist, 9/2015 - 5/2016
- LDS Missionary, Missionary, 8/2013 - 9/2015

Certifications: **CFP**

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- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and

- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Jake Elm has no required disclosures under this item.

Item 4 Other Business Activities

Jake Elm is not actively engaged in any other business or occupation (investment-related or otherwise) beyond his capacity as a Associate Adviser/Investment Adviser Representative of Dentist Advisors. Moreover, Mr. Elm does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

Item 5 Additional Compensation

Jake Elm does not receive any additional compensation beyond that received as a Associate Adviser/Investment Adviser Representative of Dentist Advisors.

Item 6 Supervision

In the supervision of our associated persons, advice provided is limited based on the restrictions set by Dentist Advisors, and by internal decisions as to the types of investments that may be included in client portfolios. We conduct periodic reviews of client holdings and documented suitability information to provide reasonable assurance that the advice provided remains aligned with each client's stated investment objectives and with our internal guidelines.

My supervisor is: Justin Copier, Chief Compliance Officer

Supervisor phone number: 801-748-1243

Taylor Kevin Sutterfield, CFP®

**Aquire Wealth Advisors, LLC
d/b/a: Dentist Advisors**

**879 Baxter Drive
South Jordan, UT 84095**

**Telephone: 801-748-1243
Facsimile: 801-454-0434**

January 6, 2022

**FORM ADV PART 2B
BROCHURE SUPPLEMENT**

This brochure supplement provides information about Taylor Kevin Sutterfield that supplements the Dentist Advisors brochure. You should have received a copy of that brochure. Contact us at 801-748-1243 if you did not receive Dentist Advisors's brochure or if you have any questions about the contents of this supplement.

Additional information about Taylor Kevin Sutterfield (CRD # 6892490) is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2 Educational Background and Business Experience

Taylor Kevin Sutterfield, CFP

Year of Birth: 1992

Formal Education After High School:

- Brigham Young University, BS Accounting, 2018
- Brigham Young University, MS Accounting, 2018

Business Background:

- Acquire Wealth Advisors, LLC d/b/a Dentist Advisors, Associate 03/2020, Investment Advisor Representative 9/2021 - Present
- Taylor Sutterfield, Landscaping, 8/2016 - 9/2021
- Northwestern Mutual Wealth Management Company, Representative, 5/2019 - 3/2020
- Northwestern Mutual Investment Services LLC, Registered Representative, 8/2018 - 3/2020
- Northwestern Mutual Life Insurance Company, Agent, 1/2018 - 3/2020
- Guardian Alarm, Intern, 7/2017 - 8/2017
- Riverside Country Club, Pro Shop Attendant, 6/2009 - 5/2017
- KPMG, Intern, 1/2017 - 3/2017

Certifications: **CFP**

CERTIFIED FINANCIAL PLANNER™ (CFP®)

Certified Financial Planner (CFP®) – Certified Financial Planner (CFP®) is a professional financial planning designation awarded by Certified Financial Planner Board of Standards, Inc. ("CFP Board") in the United States. Individuals holding the professional designation themselves as CERTIFIED FINANCIAL PLANNER™ professionals or CFP® professionals, and may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold CFP® certification. You may find more information about CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials.

Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.

Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

Continuing Education – Complete 30 hours of continuing education hours every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Item 3 Disciplinary Information

Form ADV Part 2B requires disclosure of certain criminal or civil actions, administrative proceedings, and self-regulatory organization proceedings, as well as certain other proceedings related to suspension or revocation of a professional attainment, designation, or license. Mr. Taylor Kevin Sutterfield has no required disclosures under this item.

Item 4 Other Business Activities

Taylor Kevin Sutterfield is not actively engaged in any other business or occupation (investment-related or otherwise) beyond his capacity as an Investment Advisor Representative of Dentist Advisors. Moreover, Mr. Sutterfield does not receive any commissions, bonuses or other compensation based on the sale of securities or other investment products.

Item 5 Additional Compensation

Taylor Kevin Sutterfield does not receive any additional compensation beyond that received as an Investment Advisor Representative of Dentist Advisors.

Item 6 Supervision

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My supervisor is: Justin Copier, Chief Compliance Officer

Supervisor phone number: 801-748-1243