

FCA CORP

791 Town & Country Blvd #250 | Houston, TX 77024

Website | www.fcacorp.com

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FORM ADV PART 2B BROCHURE SUPPLEMENT

CRD No. 110658

The Securities and Exchange Commission (“SEC”) now requires disclosures about certain people providing advice to you. FCA Corp (“FCA”) has prepared this Brochure Supplement for the purpose of providing information about the qualifications and background of the supervised persons working with you or on your behalf or who may otherwise participate in the advisory services provided to you.

This Supplement provides information regarding the following employees:

1. Robert W. Scharar
2. Wesley Yuhnke
3. Robert Burns
4. William LeVay
5. Cindy Yac
6. Christina Scharar Doherty
7. Ryan Scharar
8. Casey Kha
9. Brandon Williams
10. Derick van Wyck
11. Erin Menking

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ITEM 1. SUPERVISED PERSON: ROBERT W. SCHARAR

Founder and Chief Executive Officer (“CEO”)

791 Town & Country Blvd #250 | Houston, TX 77024

Phone | (713) 781-2856

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This Brochure Supplement provides information about the abovementioned individual that supplements the FCA Corp Brochure. You should have received a copy of that brochure. Please contact FCA's Chief Compliance Officer, William LeVay, at (713) 781-2856 if you did not receive FCA's Brochure or if you have any questions about the content of this supplement.

Additional information about the abovementioned individual is available on the SEC's website at www.adviserinfo.sec.gov.

ITEM 2. EDUCATIONAL BACKGROUND | BUSINESS EXPERIENCE:

EDUCATION:

- Associate of Arts in Accounting from Polk Junior College
- Bachelor of Science in Accounting from the University of Florida
- Master of Business Administration from Northeastern University
- Juris Doctorate from Northeastern University Law School
- Master of Law (LL.M.) in Taxation from Boston University School of Law

RECENT EMPLOYMENT HISTORY:

- President, FCA Corp from 05/1984 to 12/2023

PROFESSIONAL DESIGNATIONS:

- Certified Public Accountant (CPA), Florida,
- Member of the Massachusetts bar, and Florida bar

Mr. Scharar is licensed as a Certified Public Accountant (CPA) in the state of Florida and an attorney licensed to practice law in the states of Florida and Massachusetts. However, Mr. Scharar does not currently maintain a separate professional practice as a CPA or as an attorney.

ITEM 3. DISCIPLINARY INFORMATION:

No disclosure required for ADV 2

ITEM 4. OTHER BUSINESS ACTIVITIES:

Mr. Scharar is an officer, director, and/or manager of the following entities:

- Director/President, First Commonwealth Holdings Corp., from 09/1999 to present (It is the parent of FCA Corp.)
- Director Paratransit Corp Insurance Company from 2019 to present. The time spent is not substantial for this entity.

Mr. Scharar spends a substantial amount of time providing services and serves as an officer director and or manager to the following client entities:

- Africap, LLC, and subsidiary companies:
 - Director, Blantyre Hotels Ltd., from 1999 to present
 - Director, Oasis Hospitality Ltd., from 2019 to present
 - Director, Oasis Teranga Group SA, from 2018 to present
 - Director, Nico Holdings Ltd., from 2001 to present
 - Director, Nico Capital Corp from 2020 to present
- Commonwealth International Series Trust
- First Commonwealth Mortgage Trust
- Holly Mortgage Trust

ITEM 5. ADDITIONAL COMPENSATION:

Mr. Scharar does not receive separate compensation from the entities listed in **Item 4** other than Paratransit, which pays a non-substantial annual stipend and a meeting fee. Any Director fees earned by Mr. Scharar from the Africap, LLC, subsidiary companies listed in **Item 4**, are paid directly to Africap, LLC.

ITEM 6. SUPERVISION:

In addition to his role as an officer of FCA, Mr. Scharar provides advisory services to clients. Mr. Scharar provides this service in various roles such as: portfolio manager of mutual funds, officer of managed entities, and as a senior financial planner to individuals. He also serves as Chairman of the Investment Committee of FCA. The Investment Committee works as a team to evaluate certain investments for separately managed accounts. It meets periodically to review investments included on the approved list and to consider whether securities should be added or removed.

FCA has developed policies and procedures which are designed to standardize processes and internal controls for the company. Every employee is required to be

responsible for preventing and reporting any activities inconsistent with the firm's Code of Ethics, procedures, policies or legal/regulatory requirements.

Although Mr. Scharar is the Founder and CEO of FCA, his actions are subject to review by various employees within the firm. Mr. Scharar's actions related to the managed entities are also subject to approval and/or ratification by the board of directors for the particular entity.

If you have any questions, you may contact FCA's Chief Compliance Officer, William LeVay, at (713) 781-2856.

ITEM 1. SUPERVISED PERSON: WESLEY YUHNKE

Chief Investment Officer ("CIO")

791 Town & Country Blvd #250 | Houston, TX 77024

Phone | (713) 781-2856

Fax | (713) 781-4923

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Additional information about the abovementioned individual is available on the SEC website at www.adviserinfo.sec.gov.

ITEM 2. EDUCATIONAL BACKGROUND | BUSINESS EXPERIENCE:

EDUCATION:

- Bachelor of Business Administration in Finance from Stephen F. Austin State University
- Graduated *cum laude* from Texas Tech University with a Master of Business Administration (MBA)

RECENT EMPLOYMENT HISTORY:

- Chief Investment Officer, FCA Corp 06/2008 to present
- Assistant Portfolio Manager, FCA Corp from 05/2002 to present
- Investment Operations Manager, FCA Corp from approximately 07/2004 to 06/2008

ITEM 3. DISCIPLINARY INFORMATION:

None

ITEM 4. OTHER BUSINESS ACTIVITIES:

Mr. Yuhnke is an officer of the following entities that are clients of FCA or a related entity:

- Executive Vice President, Commonwealth International Series Trust

ITEM 5. ADDITIONAL COMPENSATION:

Mr. Yuhnke does not receive separate compensation for serving as an officer of other managed entities that are FCA clients.

ITEM 6. SUPERVISION:

Mr. Yuhnke serves as the Chief Investment Officer for FCA. In this capacity, Mr. Yuhnke coordinates investment research, trading and investment operations. He is a member of the Investment Committee. The Investment Committee works as a team to evaluate certain investments for separately managed accounts. The Investment Committee meets periodically to review securities maintained on the approved list and to consider whether securities should be added or removed.

He may also meet individually with financial planning employees and clients to discuss specific client portfolios.

FCA has developed policies and procedures which are designed to standardize processes and internal controls for the company. Every employee is required to be responsible for preventing and reporting any activities inconsistent with the firm's Code of Ethics, procedures, policies or legal/regulatory requirements.

Mr. Yuhnke is supervised by Robert W. Scharar, who can be reached at (713) 781-2856.

ITEM 1. SUPERVISED PERSON: ROBERT BURNS

Director of Tax Compliance

791 Town & Country Blvd #250 | Houston, TX 77024

phone | (713) 781-2856

fax | (713) 784-4923

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Additional information about the abovementioned individual is available on the SEC website at www.adviserinfo.sec.gov.

ITEM 2. EDUCATIONAL BACKGROUND | BUSINESS EXPERIENCE:

EDUCATION:

- Bachelor of Science in Accounting from Mississippi State University

RECENT EMPLOYMENT HISTORY

- Director of Tax Compliance, FCA Corp from 2019 to present
- Director of Tax Services, FCA Corp from 2004 to 2019

PROFESSIONAL DESIGNATIONS:

- Certified Public Accountant (CPA), Texas,
- Chartered Global Management Accountant (CGMA)

ITEM 3. DISCIPLINARY INFORMATION:

None

ITEM 4. OTHER BUSINESS ACTIVITIES:

Mr. Burns provides limited tax preparation services to individuals that are not FCA clients.

Mr. Burns is an officer of the following entities that are clients of FCA or a related entity:

- First Commonwealth Mortgage Trust
- Holly Mortgage Trust

ITEM 5. ADDITIONAL COMPENSATION:

Mr. Burns does not receive separate compensation for serving as an officer of other managed entities that are FCA clients.

ITEM 6. SUPERVISION:

Mr. Burns provides advisory services to FCA managed entities. These services are supervised by Robert W. Scharar, who can be reached at (713) 781-2856, and are also subject to approval and/or ratification by the board of directors for the particular entity.

FCA has developed policies and procedures which are designed to standardize processes and internal controls for the company. Every employee is required to be responsible for preventing and reporting any activities inconsistent with the firm's Code of Ethics, procedures, policies or legal/regulatory requirements.

ITEM 1. SUPERVISED PERSON: WILLIAM LeVAY

Chief Compliance Officer ("CCO") & In House-Counsel
791 Town & Country Blvd #250 | Houston, TX 77024
phone | (713) 781-2856
fax | (713) 781-4923

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Additional information about the abovementioned individual is available on the SEC website at www.adviserinfo.sec.gov.

ITEM 2. EDUCATIONAL BACKGROUND | BUSINESS EXPERIENCE:

EDUCATION:

- Bachelor of Science in Business from Indiana University -Bloomington
- Juris Doctorate from Baylor University School of Law

RECENT EMPLOYMENT HISTORY:

- In House-Counsel, FCA Corp from 12/2008 to present
- Chief Compliance Officer, FCA Corp from 12/2012 to present

PROFESSIONAL DESIGNATIONS:

- Certified Public Accountant (CPA), Texas,
- Member of the Texas Bar

Mr. LeVay is licensed to practice law in the state of Texas. Mr. LeVay is licensed as a certified public accountant (CPA) in the state of Texas. Mr. LeVay does not currently maintain a separate professional practice as a CPA.

ITEM 3. DISCIPLINARY INFORMATION:

None

ITEM 4. OTHER BUSINESS ACTIVITIES:

William LeVay is an officer of the following entities that are clients of FCA or a related entity:

- Chief Compliance Officer (CCO), Commonwealth International Series Trust
- Secretary, First Commonwealth Mortgage Trust

ITEM 5. ADDITIONAL COMPENSATION:

Mr. LeVay receives compensation from his role as CCO for the Commonwealth International Series Trust. Mr. LeVay does not receive separate compensation for serving as an officer of other managed entities that are FCA clients.

ITEM 6. SUPERVISION:

Mr. LeVay provides advisory management services to managed entities. These services are supervised by Robert W. Scharar, who can be reached at (713) 781-2856, and are also subject to approval and/or ratification by the board of directors for the particular entity.

FCA has developed policies and procedures which are designed to standardize processes and internal controls for the company. Every employee is required to be responsible for preventing and reporting any activities inconsistent with the firm's Code of Ethics, procedures, policies or legal/regulatory requirements.

ITEM 1. SUPERVISED PERSON: CINDY YAC

Financial Planner Associate

791 Town & Country Blvd #250 | Houston, TX 77024

phone | (713) 781-2856

fax | (713) 781-4923

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Additional information about the abovementioned individual is available on the SEC website at www.adviserinfo.sec.gov.

ITEM 2. EDUCATIONAL BACKGROUND | BUSINESS EXPERIENCE:

EDUCATION:

- Bachelor of Business Administration in Finance from The University of Texas at Austin
- Master of Business Administration from Houston Baptist University

RECENT EMPLOYMENT HISTORY:

- Financial Planning Associate, FCA Corp from 02/2016 to present
- Claims Examiner, Broadspire Services from 09/2013 to 01/2016
- Executive Team Leader, Target Corporation from 08/2012 to 06/2013

ITEM 3. DISCIPLINARY INFORMATION:

None

ITEM 4. OTHER BUSINESS ACTIVITIES:

None

ITEM 5. ADDITIONAL COMPENSATION:

None

ITEM 6. SUPERVISION:

Mrs. Yac currently serves as a Financial Planning Associate for the firm. She provides assistance to the financial planning team. The number of clients each team member is assigned will vary.

FCA has developed policies and procedures which are designed to standardize processes and internal controls for the company. Every employee is required to be responsible for preventing and reporting any activities inconsistent with the firm's Code of Ethics, procedures, policies or legal/regulatory requirements.

Mrs. Yac is supervised by Christina Doherty, who can be reached at (713) 781-2856.

ITEM 1. SUPERVISED PERSON: CHRISTINA SCHARAR DOHERTY

Vice President and Director of Financial Planning

791 Town & Country Blvd #250 | Houston, TX 77024

Phone | (713) 781-2856

Fax | (713) 781-4923

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Additional information about the abovementioned individual is available on the SEC's website at www.adviserinfo.sec.gov.

ITEM 2. EDUCATIONAL BACKGROUND | BUSINESS EXPERIENCE:

EDUCATION:

- Graduated *magna cum laude* from Texas Christian University with a Bachelor of Business Administration in Accounting and a Bachelor of Arts in Spanish, 2008
- Master of Science in Accounting from Northeastern University, 2009
- Graduated *magna cum laude* from Michigan State University College of Law with a Juris Doctorate, 2012

RECENT EMPLOYMENT HISTORY:

- Vice President and Director of Financial Planning, 04/2024 to Present
- Wealth & Tax Advisor, FCA Corp from 01/2019 to 04/2024
- Tax Manager, Deloitte Tax LLP from 08/2016 to 01/2019
- Tax Senior, Deloitte Tax LLP from 09/2014 to 08/2016
- Tax Consultant, Deloitte Tax LLP from 08/2012 to 08/2014

PROFESSIONAL DESIGNATIONS:

- Certified Public Accountant (CPA), Texas
- Member of the Texas bar

Mrs. Doherty is licensed as a Certified Public Accountant (CPA) in the state of Texas and an attorney licensed to practice law in the state of Texas. However, Mrs. Doherty does not currently maintain a separate professional practice as a CPA or as an attorney.

ITEM 3. DISCIPLINARY INFORMATION:

None

ITEM 4. OTHER BUSINESS ACTIVITIES:

Mrs. Doherty is an officer of the following entities:

- Treasurer, First Commonwealth Holdings Corp. (parent company of FCA Corp) from 8/2019 to present
- Treasurer, United Investments Inc., from 2012 to present (family entity unpaid positions)
- Clerk, Trans Union Industries, Inc., from 2010 to present (family entity unpaid positions)

Activity in the positions listed above is infrequent in nature and does not require a substantial amount of time.

ITEM 5. ADDITIONAL COMPENSATION:

None of the positions listed in Item 4 are paid positions.

ITEM 6. SUPERVISION:

Mrs. Doherty currently serves as Vice President and Director of Financial Planning for the firm. She oversees the financial planning department and provides financial planning services to assigned clients. The number of clients each team member is assigned will vary.

FCA has developed policies and procedures which are designed to standardize processes and internal controls for the company. Every employee is required to be responsible for preventing and reporting any activities inconsistent with the firm's Code of Ethics, procedures, policies or legal/regulatory requirements.

Mrs. Doherty is supervised by Robert W. Scharar, who can be reached at (713) 781-2856.

ITEM 1. SUPERVISED PERSON: RYAN E. SCHARAR

President and Director of Tax

1515 8th Ave. Fort Worth, Texas 76104

Phone | (713) 781-2856 Fax | (713) 583-3768

Phone | (713) 781-2856

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Additional information about the abovementioned individual is available on the SEC's website at www.adviserinfo.sec.gov.

ITEM 2. EDUCATIONAL BACKGROUND | BUSINESS EXPERIENCE:

EDUCATION:

- Bachelor of Business Administration in Accounting from Stephen F. Austin State University, 2022
- Master of Business Administration from Baylor University, 2003
- Graduated *cum laude* from Michigan State University College of Law with a Juris Doctorate degree, 2009

RECENT EMPLOYMENT HISTORY:

- President and Director of Tax, FCA Corp from 04/2024 to present
- Tax Director & Strategic Planner, FCA Corp from 01/2021 to 04/2024
- President, Scharar Law Firm, PC from 08/2015 to present
- Sole Proprietor, Ryan E. Scharar, CPA from 04/2014 to 12/2019

PROFESSIONAL DESIGNATIONS:

- Certified Public Accountant (CPA), Texas
- Member of the Texas bar

Ryan Scharar is licensed as a Certified Public Accountant (CPA) in the state of Texas and an attorney licensed to practice law in the state of Texas. Mr. Scharar currently maintains a separate professional practice as an attorney.

ITEM 3. DISCIPLINARY INFORMATION:

None

ITEM 4. OTHER BUSINESS ACTIVITIES:

Ryan Scharar is an officer, director, and/or manager of the following entities where time spent is not substantial:

- Secretary, First Commonwealth Holdings Corp, from 2016 to present (parent company of FCA Corp)
- Treasurer, Trans Union Industries Inc., from 2001 to present (Family entity)
- Assistant Secretary, United Investments Inc., from 2012 to present (Family entity)
- Director, The Financial Advisory Group, Inc., 2022 to present.

Ryan Scharar is an officer of the following FCA client entities, spending not insubstantial amount of time:

- Vice President, Africap, LLC from 2018 to present and subsidiaries:
 - Director, Nico Holdings Ltd., from 2016 to present
 - Director, Nico Life Insurance Company Limited, from 2016 to present
 - Director, Nico Asset Managers Limited, from 2016 to present
- President, Scharar Law Firm, PC, from 2015 to present
- Managing Member of M&R Capital Partners, LLC, from 2022 to present

ITEM 5. ADDITIONAL COMPENSATION:

Ryan Scharar does not receive separate compensation from the entities listed in **Item 4** other than from serving as Director of The Financial Advisory Group, Inc, which pays a non-substantial stipend and meeting fees. Ryan also received compensation from his work and as President of the Scharar Law Firm which may not be non-substantial. Any fees from Ryan Scharar's services as a director of Nico Holdings Ltd. Nico Capital Corp, and Blantyre Hotels Ltd., are paid directly to Africap, LLC.

ITEM 6. SUPERVISION:

Ryan Scharar serves as a President & Director of Tax for the firm. He oversees the tax department and provides tax compliance and wealth management services to assigned clients. The number of clients each team member is assigned will vary.

FCA has developed policies and procedures which are designed to standardize processes and internal controls for the company. Every employee is required to be responsible for preventing and reporting any activities inconsistent with the firm's Code of Ethics, procedures, policies or legal/regulatory requirements.

Ryan Scharar is supervised by Robert W. Scharar, who can be reached at (713) 781-2856.

ITEM 1. SUPERVISED PERSON: CASEY KHA

Wealth Advisor

1515 8th Ave. Fort Worth, Texas 76104

Phone | (713) 781-2856 Fax | (713) 583-3768

Phone | (817) 912-5591

Fax | (713) 583-3768

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Additional information about the abovementioned individual is available on the SEC's website at www.adviserinfo.sec.gov.

ITEM 2. EDUCATIONAL BACKGROUND | BUSINESS EXPERIENCE:

EDUCATION:

Graduated from *cum laude* from Texas Tech University with a Bachelor of Science in Personal Financial Planning in 2006

RECENT EMPLOYMENT HISTORY:

- Financial Planner, FCA Corp from 01/2022 to present
- Managing Partner & Consultant, Shinjuku Station Restaurant Group from 08/2010 to 09/2023
- Financial Planner, Lincoln Financial Advisors from 01/2007 to 05/2010

PROFESSIONAL DESIGNATIONS:

Certified Financial Planner ®, 2009

ITEM 3. DISCIPLINARY INFORMATION:

None

ITEM 4. OTHER BUSINESS ACTIVITIES:

None

ITEM 5. ADDITIONAL COMPENSATION:

None

ITEM 6. SUPERVISION:

Mr. Kha currently serves as a Financial Planner for the firm. He provides financial planning services to assigned clients. The number of clients each team member is assigned will vary.

FCA has developed policies and procedures which are designed to standardize processes and internal controls for the company. Every employee is required to be responsible for preventing and reporting any activities inconsistent with the firm's Code of Ethics, procedures, policies or legal/regulatory requirements.

Mr. Kha is supervised by Christina Doherty, who can be reached at (713) 781-2856.

ITEM 1. SUPERVISED PERSON: BRANDON WILLIAMS

Financial Planning Associate

791 Town & Country Blvd #250 | Houston, TX 77024

Phone | (713) 260-1412

Fax | (713) 583-3768

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Additional information about the abovementioned individual is available on the SEC's website at www.adviserinfo.sec.gov.

ITEM 2. EDUCATIONAL BACKGROUND | BUSINESS EXPERIENCE:

EDUCATION:

- Bachelor of Science in Biology -University of Calgary, 2005.
- Associates Degree in Business Administration, Specialization in Finance - Southern Alberta Institute of Technology, 2010.
- Masters of Business Administration-Finance, University of Calgary, 2015.

RECENT EMPLOYMENT HISTORY:

- Financial Planning Associate, FCA Corp from 11/2022 to present
- Associate Advisor, Griffith & Associates Financial & Estate Planning Services in Calgary, Canada from 10/2020 to 5/2022
- Senior Financial Advisor, CIBC Bank Canada, from 9/2017 to 10/2020
- Premier Relationship Manager, HSBC Bank Canada, from 1/2014 to 9/2017
- Premium Banker, HSBC Bank Canada, from 1/2012 to 1/2014

PROFESSIONAL DESIGNATIONS:

Certified Financial Planner ® (2025)

ITEM 3. DISCIPLINARY INFORMATION:

None

ITEM 4. OTHER BUSINESS ACTIVITIES:

None

ITEM 5. ADDITIONAL COMPENSATION:

None

ITEM 6. SUPERVISION:

Brandon Williams provides assistance to the financial planning team. The number of clients each team member is assigned will vary.

FCA has developed policies and procedures which are designed to standardize processes and internal controls for the company. Every employee is required to be responsible for preventing and reporting any activities inconsistent with the firm's Code of Ethics, procedures, policies or legal/regulatory requirements.

Brandon Williams is supervised by Christina Doherty, who can be reached at (713) 781-2856.

ITEM 1. SUPERVISED PERSON: DERICK VAN WYK

Investment Associate (Remote- Calgary)

791 Town & Country Blvd #250 | Houston, TX 77024

Phone | (713) 781-2856

Fax | (713) 781-4923

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Additional information about the abovementioned individual is available on the SEC website at www.adviserinfo.sec.gov.

ITEM 2. EDUCATIONAL BACKGROUND | BUSINESS EXPERIENCE:

EDUCATION:

- Bachelor of Commerce in Economics and Econometrics from University of Johannesburg in 2014.
- Bachelor of Commerce (Honors) Investment Management from University of Johannesburg in 2015
- Certificate in Quantitative Finance (CQF)TM - CQF Institute and Fitch Learning in 2016.
- Master of Arts in Applied Economics, University of Houston in 2018

RECENT EMPLOYMENT HISTORY:

- FCA Corp – Investment Consultant 10/2019 to Present
- FCA Corp – Investment Associate 6/2018 to 10/2019
- Saxo Capital Markets South Africa – Data Analyst 10/2016 to 06/2017

ITEM 3. DISCIPLINARY INFORMATION:

None

ITEM 4. OTHER BUSINESS ACTIVITIES:

None

ITEM 5. ADDITIONAL COMPENSATION:

Derick Van Wyk is not an employee of FCA, he is an independent contractor and receives fees from FCA for services.

ITEM 6. SUPERVISION:

Derick Van Wyk serves as Investment Associate for FCA. He is an independent contractor rather than an employee and currently works remotely in Calgary of Alberta, Canada. In this capacity, Derick coordinates investment research, trading and investment operations. He is a member of the Investment Committee.

He may also meet individually with financial planning employees and clients to discuss specific client portfolios.

FCA has developed policies and procedures which are designed to standardize processes and internal controls for the company. Every employee, including Derick as an independent contractor, is required to be responsible for preventing and reporting any activities inconsistent with the firm's Code of Ethics, procedures, policies or legal/regulatory requirements.

Derick van Wyk is supervised by Wes Yuhnke, who can be reached at (713) 781-2856.

ITEM 1. SUPERVISED PERSON: ERIN LANDRY MENKING

Financial Planning Associate

1515 8th Ave. Fort Worth, Texas 76104

Phone | (713) 781-2856 Fax | (713) 583-3768

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ITEM 2. EDUCATIONAL BACKGROUND | BUSINESS EXPERIENCE:

EDUCATION:

- Bachelor of Arts History – Southwestern University
- Certificate in Financial Planning – Southern Methodist University, 2017

RECENT EMPLOYMENT HISTORY:

- Financial Planning Associate, FCA Corp from 10/2024 to present
- Operations, Marim Wealth Planning from 07/2023 to 09/2024
- Associate Advisor, Aspire Planning Associates from 01/2023 to 06/2023
- Operations, Aspire Planning Associates from 02/2019 to 12/2022
- Independent Contract Client Service Associate from 10/2018 to 01/2019
- Multiple Roles (Client Service Associate, Operations Specialist, Operations Manager), The Rudd Company from 10/2015 to 09/2018

PROFESSIONAL DESIGNATIONS:

Certified Financial Planner ® (2020)

ITEM 3. DISCIPLINARY INFORMATION:

None

ITEM 4. OTHER BUSINESS ACTIVITIES:

None

ITEM 5. ADDITIONAL COMPENSATION:

None

ITEM 6. SUPERVISION:

Ms. Menking provides assistance to the financial planning team. The number of clients each team member is assigned will vary. FCA has developed policies and procedures which are designed to standardize processes and internal controls for the company. Every employee is required to be responsible for preventing and reporting any activities inconsistent with the firm's Code of Ethics, procedures, policies or legal/regulatory requirements.

Erin Landry Menking is supervised by Casey Kha, who can be reached at (713) 781-2856.

PROFESSIONAL DESIGNATION REQUIREMENTS

1. **Certified Financial Planner® (CFP®):**

The CFP® designation is issued by the Certified Financial Planner Board of Standards, Inc. To obtain the CFP® certification, an individual must complete a CFP Board-registered education program, pass the CFP® certification examination, hold a bachelor's degree or higher, and have at least three years of financial planning-related experience. CFP® professionals must adhere to the CFP Board's Code of Ethics and Standards of Conduct and complete 30 hours of continuing education every two years.

2. **Certified Public Accountant (CPA):**

The CPA designation is issued by state boards of accountancy. To become a CPA, an individual must complete a bachelor's degree with a specified number of accounting and business coursework hours, pass the four-part Uniform CPA Examination, and meet state-specific experience requirements. CPAs must complete continuing professional education (CPE) requirements annually or biennially to maintain their license.

3. **Attorney License-Member of State Bar:**

Attorneys must hold a Juris Doctor (J.D.) degree from an accredited law school, pass the bar examination in their state(s) of licensure, and meet any additional requirements for admission to the bar. Attorneys must comply with continuing legal education (CLE) requirements and adhere to ethical standards set by their state bar associations.

4. **Chartered Global Management Accountant (CGMA)**

(CGMA)" is a professional designation awarded to accountants who demonstrate advanced expertise in management accounting, signifying proficiency in areas like finance, operations, strategy, and management on a global scale; it is considered the premier credential for management accountants and is recognized worldwide by the American Institute of Certified Public Accountants (AICPA) and the Chartered Institute of Management Accountants (CIMA).