ADV PART 2B

Abacus Wealth Partners, LLC

Form ADV Part 2B
Investment Adviser Brochure Supplement

Supervisors

Neela Hummel, CEO
Barrett Porter, Chief of Advisors
Jorge Paganin, *Chief Compliance Officer*

Investment Advisor Representatives

Kelly Acheson
Rasheed Ahmed
Kathleen Barron-Alicante
Emily Benedetto
Elizabeth Boehne
Lauren Boyes
Gabriel Brenner
Rose Brink-Capriola
Tiesha Cullins
Jana Davis
Hannah Entenman
Elise Faur
Dennis Grossman
Christopher Habib
Neela Hummel
Brenton Kessel
Lara Lamb
Wilson Li
Kasey McManis
Matthew McNeely
Susan Olson
Kathryn Peyton
Jason Pollens
Barrett Porter
Matthew Rivera
Spencer Sherman
Daniel Smith
Kate Sumner
Daria Victorov
Christopher Vallejo
Elizabeth (Ariel) Ward
Katelynn Wiley
Kyle Williams
Barbara Wolf
Lindsey Woodward Rafkind
Jacqueline Worstell
Walter Yu

Lindsey Woodward Rafkind, Co-Chief Investment Officer
Matthew Rivera, Co-Chief Investment Officer
Walter Yu, Director of Portfolio Management

May 2025

This brochure supplement provides information about the Firm's Supervised Persons that supplements Abacus Wealth Partners' brochure. Please contact Jorge Paganin, Chief Compliance Officer, at jorge@abacuswealth.com if you did not receive Abacus Wealth Partners' brochure or if you have any questions about the contents of this supplement.

Additional information about the Firm's Supervised Persons is also available on the SEC's website at: http://advisorinfo.sec.gov

429 Santa Monica Blvd, Suite 500 | Santa Monica, CA 90401

Kelly Jayne Acheson

Personal CRD #: 6076207 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
11/2005-Present	Abacus Wealth Partners (Client Service Associate)	Sebastopol, CA

Education:
No Formal Education after High School

Year of Birth: 1969

Professional Designations:
Financial Paraplanner Qualified Professional (FPQP™)

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2013

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Kelly Jayne Acheson has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Kelly Jayne Acheson does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Kelly Jayne Acheson is supervised by the firm's Chief Compliance Officer. The Chief Compliance Officer is responsible for ensuring that Kelly Jayne Acheson adheres to all required regulations regarding the activities of an

Investment Adviser Representative, as well as policies and procedures outlined in the firm's Code of Ethic and compliance manual. The Chief Compliance Officer's phone number is (310) 566-1888.

Rasheed Ahmed

Personal CRD #: 7188426 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
10/2019-Present	Abacus Wealth Partners (Advisor)	Santa Monica, CA
06/2019 – 09/2019	Unemployed	Los Angeles, CA
11/2016 – 06/2019	Warner Pacific Insurance Services (Sales Associate)	Westlake Village, CA
08/2016 – 11/2016	Unemployed	Los Angeles, CA
09/2013 – 08/2016	UCLA (student)	Los Angeles, CA

Education:
University of California – Los Angeles, BS, 2016

Year of Birth: 1993

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2020
Accident & Health, Life-Only (CA), 2019

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Rasheed Ahmed is also a licensed life, accident, and health and sickness insurance professional. Implementations of

insurance recommendations are separate and apart from Rasheed Ahmed's role with Abacus Wealth Partners. As an insurance professional, Rasheed Ahmed will receive customary commissions and other related revenues from the various insurance companies whose products are sold. Rasheed Ahmed is not required to offer the products of any particular insurance company. Commissions generated by insurance sales do not offset regular advisory fees. This practice presents a conflict of interest in recommending certain products of the insurance companies. Clients are under no obligation to implement any recommendations made by Rasheed Ahmed.

Item 5: Additional Compensation
Rasheed Ahmed does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Rasheed Ahmed is supervised by Barrett Porter, the firm's Chief of Advisors. Barrett Porter is responsible for ensuring that Rasheed Ahmed adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as policies and procedures outlined in the firm's Code of Ethic and compliance manual. Barrett's Porter's phone number is (310) 566-1888.

Kate Barron-Alicante

Personal CRD # 7002732 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
01/2020 – Present	Abacus Wealth Partners (Advisor)	Philadelphia, PA
11/2017- 01/2020	Abacus Wealth Partners (Associate Advisor)	Philadelphia, PA
03/2017 – 09/2017	Financial Planning Standards Board (Consultant)	Denver, CO
02/2012 – 10/2017	The University of Tulsa (Administrator)	Tulsa, OK

Education:
University of London (SOAS), MsC, 2003
Boston University, BA, 2000

Year of Birth: 1978

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Advisor Law Examination (Series 65), 2018

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Kate Barron-Alicante has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Kate Barron-Alicante does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Kate Barron-Alicante is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Kate Barron-Alicante adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. Barrett Porter's phone number is (310) 566-1888.

Emily Rose Benedetto

Personal CRD # 6849355 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location

08/2017-Present	Abacus Wealth Partners (Advisor)	Santa Monica, CA
12/2015-08/2017	Pacific Ocean Pediatrics (Office Manager)	Santa Monica, CA
02/2014-12/2015	Sugar Paper (Wholesale Accounts Manager)	Los Angeles, CA

Education:
Wheaton College, BA, 2011

Year of Birth: 1989

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2017

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client’s or prospective client’s evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Emily Rose Benedetto has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Emily Rose Benedetto does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Emily Rose Benedetto is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Emily Rose Benedetto adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the

firm's Code of Ethics and compliance manual. Barrett Porter's phone number is (310) 566-1888.

Elizabeth Metcalf Boehne

Personal CRD # 7779092 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
06/2023-Present	Abacus Wealth Partners (Advisor)	Santa Monica, CA
12/2021-05/2023	Woodward Financial Advisors (Associate Advisor)	Chapel Hill, NC
08/2017-11/2021	Presbyterian Campus Ministry (Executive Director)	Durham, NC
08/2016-08/2017	Greensboro Chamber of Commerce (Community Manager)	Greensboro, NC
08/2014-08/2016	First Presbyterian Church Greensboro (Pastoral Resident)	Greensboro, NC

Education:
Duke University, Master of Divinity, 2014
Wheaton College, BA, 2011

Year of Birth: 1988

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2023

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Elizabeth Metcalf Boehne has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Elizabeth Metcalf Boehne does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Elizabeth Metcalf Boehne is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Elizabeth Metcalf Boehne adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. Barrett Porter's phone number is (310) 566-1888.

Lauren Taylor Boyes

Personal CRD # 6001568 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
07/2018-Present	Abacus Wealth Partners (Advisor)	Sebastopol, CA
04/2016- 07/2018	Raymond James Financial Services, Inc. (Financial Advisor)	Colusa, CA
02/2015-05/2015	LPL Financial (Intern)	San Diego, CA
09/2013 – 01/2014	Coghlan Financial Group (Intern)	San Diego, CA

09/2013-05/2015	UC San Diego (Student)	San Diego, CA
12/2010 – 05/2015	Edward Jones Investments (On Call Branch Office Administrator)	Colusa, CA

Education:
University of California San Diego, BA, 2015

Year of Birth: 1991

Professional Designations:
None

Industry Examinations Passed:
Uniform Combined State Law Examination (Series 66), 2016
Uniform Investment Adviser Law Examination (Series 65), 2023

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Lauren Taylor Boyes has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Lauren Taylor Boyes does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Lauren Taylor Boyes is supervised by the firm's Chief Compliance Officer. The Chief Compliance Officer is responsible for ensuring that Lauren Taylor Boyes adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The Chief Compliance Officer's phone number is (310) 566-1888.

Gabriel ("Gabe") Stephen Brenner

Personal CRD # 2675337 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
11/2014-Present	Abacus Wealth Partners (Partner, Advisor)	San Carlos, CA
08/2010-12/2014	Next Step Wealth, LLC (Investment Advisor Representative)	Redwood City, CA
06/2007-12/2010	Waypoint Wealth Partners (Advisor Representative)	Newport Beach, CA

Education:
Drew University, BA, 1993

Year of Birth: 1970

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.
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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.

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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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2004

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Gabriel Stephen Brenner has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Gabriel Stephen Brenner does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Gabriel Stephen Brenner is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Gabriel Stephen Brenner adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Rose Brink-Capriola

Personal CRD # 7332885 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
01/2021-Present	Abacus Wealth Partners (Advisor)	Sebastopol, CA
11/2020-01/2021	Full-Time Student (Golden Gate MS in Financial Plan.)	San Francisco, CA
08/2020-11/2020	DaVero Farms and Winery (Harvest Assistant)	Healdsburg, CA
12/2019 – 08/2020	Full-Time Student (Golden Gate University)	San Francisco, CA
01/2019-12/2019	Formation Farm (Owner-Operator)	Sebastopol, CA
02/2017-05/2019	Singing Frogs Farm (Farm Manager)	Sebastopol, CA
01/2017-02/2017	Pyramid Farms (Farm Hand)	Chico, CA
11/2016-01/2017	Extended Travel / Unemployment	Chico, CA
04/2016-11/2016	Hawthorne Valley Association	Ghent, NY

	(Farm Apprentice)	
07/2015-04/2016	Extended Travel / Volunteer & Unemployment	Hilo, HI., Chico, CA. USA
08/2014-07/2015	Seresin Estate Farm and Vineyard (Biodynamic Intern/Tractor Operator)	Blenheim, NZL

Education:
Humboldt State University, Arcata, CA, BS, 2011

Year of Birth: 1989

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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.

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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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2021

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Rose Brink-Capriola has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Rose Brink-Capriola does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Rose Brink-Capriola is supervised by Barrett Porter, Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring

that Rose Brink-Capriola adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Tiesha Cullins

Personal CRD # 7392452 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
06/2021-Present	Abacus Wealth Partners (Advisor)	Santa Monica, CA
11/2020 – 06/2021	Unemployed	Pooler, GA
06/2017 – 10/2020	American Financial Advisors (Financial Planning Intern/Client Service Representative)	Marietta, GA
06/2016 – 11/2017	UGA Hotel and Conference Center (Lead Banquet Server/Server)	Athens, GA
11/2015 – 05/2016	Unemployed	Athens, GA
07/2014 – 11/2015	Party City (Front-End Supervisor)	Athens, GA

Education:
University of Georgia, Athens, BS, 2018

Year of Birth: 1995

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial

planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2021

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Tiesha Cullins has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Tiesha Cullins does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Tiesha Cullins is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Tiesha Cullins adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Jana Elizabeth Davis

Personal CRD # 4982445 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
10/2015-Present	Abacus Wealth Partners (Advisor)	El Segundo, CA
04/2003-10/2015	ESF Financial Planning Group (Advisor)	Manhattan Beach, CA

Education:
University of Missouri, BA, 1994

Year of Birth: 1972

Professional Designations:

Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations:
Uniform Investment Adviser Law Examination (Series 65), 2005

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or a prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Jana Elizabeth Davis has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Jana Elizabeth Davis does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Jana Elizabeth Davis is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Jana Elizabeth Davis adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Hannah Entenman

Personal CRD # 7392446 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
06/2021-Present	Abacus Wealth Partners (Advisor)	Santa Monica, CA

08/2019-04/2021	WillKate Wealth Management (Client Service Advisor)	Sioux Falls, SD
03/2017-08/2019	Avera Health (Marketing Strategist)	Sioux Falls, SD
06/2013-03/2017	Fresh Produce, LLC (Marketing Project Manager)	Sioux Falls, SD

Education:
Augustana University, Sioux Falls, BA, 2013

Year of Birth: 1991

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2021

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Hannah Entenman has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Hannah Entenman does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Hannah Entenman is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Hannah Entenman adheres to all required regulations regarding the activities of an Investment Adviser

Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Elise Faur

Personal CRD # 128590 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
07/2022-Present	Abacus Wealth Partners (Advisor)	Sebastopol, CA
02/2021-07/2022	Sabbatical	Oakland, CA
06/2016-01/2021	Obsidian Wine Company (National and International Sales Manager)	Oakland, CA
06/2013-06/2016	Hall Family Wines (National and International Sales Manager)	Napa, CA

Education:
University of California, Los Angeles, BA, 1995
University of Hawaii, Manoa, Honolulu, HI 2001
University of California, Berkeley, Berkeley, Certificate for Financial Planning 2021

Year of Birth: 1970

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2022

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Elise Faur has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Elise Faur does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Elise Faur is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Elise Faur adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Dennis Bradley Grossman

Personal CRD # 7185551 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
07/2023-Present	Abacus Wealth Partners (Financial Advisor)	Columbus, OH
11/2022 – 07/2023	Unemployed	Columbus, OH
09/2021 – 11/2022	Summit Financial Strategies (Staff Financial Advisor)	Columbus, OH
07/2021 – 09/2021	Unemployed	Carmel, IN
05/2021 – 07/2021	Valeo Financial (Associate Advisor)	Carmel, IN
06/2020 – 04/2021	PlanVest Financial (Client Services Manager)	Gaithersburg, MD
03/2019 – 06/2020	Lighthouse Financial Planning (Practice Management Assistant)	Potomac, MD
01/2019 – 03/2019	Unemployed	Hagerstown, MD

01/2018 – 01/2019	Trivergent Health Alliance MSO (Pharmacy Technician)	Frederick, MD
01/2015 – 01/2018	Rite Aid Corporation (Pharmacy Technician)	Mount Airy, MD

Education:
The Pennsylvania State University, B.S., 2014

Year of Birth: 1992

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2019

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Dennis Grossman has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Dennis Grossman does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Dennis Grossman is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Dennis Grossman adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Christopher Habib

Personal CRD # 6805793 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
07/2019-Present	Abacus Wealth Partners (Advisor)	Santa Monica, CA
05/2019-06/2019	Sabbatical	Europe
08/2015-05/2019	Virginia Polytechnic Institute & State University (Student)	Blacksburg, VA
05/2018-08/2018	Sullivan, Bruyette, Speros & Blayney (Financial Planning Intern)	McLean, VA
05/2017-08/2017	Monument Wealth Management (Financial Planning Intern)	Alexandria, VA
05/2016-08/2016	Cardinal Bank (Retail Banking Intern)	Reston, VA
08/2015 – 05/2016	Student	Blacksburg, VA
05/2015-08/2015	Smokehouse Live (Host)	Leesburg, VA
01/2011-06/2015	Heritage High School (Student)	Leesburg, VA

Education:
Virginia Polytechnic Institute & State University, B.S., 2019

Year of Birth: 1997

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial

planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2019

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Christopher Habib has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Christopher Habib does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Christopher Habib is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Christopher Habib adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Neela Bushnell Hummel

Personal CRD # 5842369 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
02/2022 – Present	Abacus Wealth Partners (Partner, Advisor & CEO)	Santa Monica, CA
01/2018-02/2022	Abacus Wealth Partners (Chief of Advisors)	Santa Monica, CA
05/2010-12/2017	Abacus Wealth Partners (Advisor)	Santa Monica, CA
01/2010-05/2010	Self Employed (Contractor)	Los Angeles, CA
02/2009-01/2010	Tapcode, Inc.	Van Nuys, CA

	(Content Manager)	

Education:
University of California, Berkeley, BA, 2006

Year of Birth: 1984

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2010

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Neela Bushnell Hummel has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Neela Bushnell Hummel does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Neela Bushnell Hummel is supervised by the firm's Chief Compliance Officer. The Chief Compliance Officer is responsible for ensuring that Neela Bushnell Hummel adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for the Chief Compliance Officer is (310) 566-1888.

Brenton ("Brent") Warwick Kessel

Personal CRD # 2826946 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
01/2004 - Present	Abacus Wealth Partners (Advisor & Partner)	Santa Monica, CA
01/2004-07/2009	Kubera Portfolios, LLC (Investment Committee Member)	Pacific Palisades, CA
11/1996-12/2003	Abacus Wealth Management (CEO, Advisor)	Santa Monica, CA

Education:
University of California, Los Angeles, BA, 1989

Year of Birth: 1968

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
None

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Brenton Warwick Kessel has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Brenton Warwick Kessel does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners Brenton Warwick Kessel is supervised by Neela Hummel, Co-CEO. Neela Hummel is responsible for ensuring that Brenton Kessel adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Neela Hummel is (310) 566-1888.

Lara Lamb

Personal CRD # 4467601 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
08/2013-Present	Abacus Wealth Partners (Advisor)	Santa Monica, CA

Education:
California State University, Northridge, BA, 2002

Year of Birth: 1976

Professional Designations:
Certified Financial Planner (CFP®)
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
None

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or a prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Lara Lamb has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Lara Lamb does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Lara Lamb is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Lara Lamb adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Wilson S Li

Personal CRD # 7899254 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
03/2024-Present	Abacus Wealth Partners (Advisor)	Santa Monica, CA
05/2021- 02/2024	Woodward Financial Advisors (Associate Advisor)	Chapel Hill, NC
01/2021-05/2021	Unemployed	Chapel Hill, NC
04/2018-01/2021	Umstead Hotel and Spa (Pastry Chef)	Cary, NC
04/2018-12/2018	The Carolina Inn (Cook)	Chapel Hill, NC
08/2017-05/2018	Campus Cooks (Kitchen Manager)	Chapel Hill, NC

Education:
University of North Carolina, Greensboro, BS, 2024
Alamance Community College, AA Culinary Arts, 2017

Year of Birth: 1996

Professional Designations:
Certified Financial Planner (CFP®) professional

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Exams:
Uniform Investment Adviser Law Examination (Series 65), 2023

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Wilson S Li has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Wilson S Li does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Wilson S Li is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Wilson S Li adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter phone number is (310) 566-1888.

Kasey Michael McManis

Personal CRD # 6892306 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
10/2019-Present	Abacus Wealth Partners (Advisor)	Philadelphia, PA
11/2017-10/2019	MyCIO Wealth Partners (Financial Analyst)	Philadelphia, PA
07/2017-11/2017	Unemployed	Philadelphia, PA

11/2012-07/2017	Mackenzie River Pizza CO. (General Manager)	Belgrade, MT
06/2006-09/2016	Montana Lodgepole Co. (Carpenter)	Bozeman, MT

Education:
Montana State University, BS, 2014

Year of Birth: 1991

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Exams:
Uniform Investment Adviser Law Examination (Series 65), 2018

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Kasey Michael McManis has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Kasey Michael McManis does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Kasey Michael McManis is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Kasey Michael McManis adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter phone number is (310) 566-1888.

Matthew Cooper McNeely

Personal CRD # 3098725 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
01/2022-Present	Abacus Wealth Partners (Investment Analyst)	Santa Monica, CA
09/2018-01/2022	Unemployed	Brooklyn, NY
07/2017-09/2018	Brooklyn Laboratory Charter School (Math Teacher)	Brooklyn, NY
09/2016-07/2017	Success Academy Charter School (Math Teacher)	Brooklyn, NY
04/2014-07/2016	Unemployed	Brooklyn, NY
07/2007-04/2014	BlackRock Investments LLC (Vice President)	New York, NY

Education:
University of California, Los Angeles (UCLA), BS, 2007

Year of Birth: 1974

Professional Designations:
None

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2024

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Matthew Cooper McNeely has no other business activities to report that represent a substantial amount of the

supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Matthew Cooper McNeely does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Matthew Cooper McNeely is supervised by Lindsey Woodward Rafkind and Matthew Rivera, co-Chief Investment Officers. Lindsey Woodward Rafkind and Matthew Rivera are responsible for ensuring Matthew Cooper McNeely adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Lindsey Woodward Rafkind is (424) 229-6764 and the phone number for Matthew Rivera is (650) 743-7968.

Susan Olson

Personal CRD # 6302750 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
02/2014-Present	Abacus Wealth Partners (Advisor)	Sebastopol, CA
07/2013-01/2014	Sabbatical	Sebastopol, CA
07/2005-6/2013	Sebastopol Independent Charter School (Executive Director)	Sebastopol, CA

Education:
Carleton College, BA, 1986
University of California, Los Angeles, MA, 1994
Claremont Graduate University, MS, 2002
*Susan Olson received a certificate from the University of California, Los Angeles for Personal Financial Planning, 2015

Year of Birth: 1964

Professional Designations:

Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2014

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Susan Olson has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Susan Olson does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Susan Olson is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring Susan Olson adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number Barrett Porter is (310) 566-1888.

Kathryn Peyton

Personal CRD #: 6708536 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
08/2016-Present	Abacus Wealth Partners (Advisor)	Sebastopol, CA
07/2016-08/2016	Self-employed (Consultant)	Penngrove, CA

01/2015-06/2016	Sonoma Academy (Teacher)	Sebastopol, CA
06/2014-01/2015	Unemployed	Penngrove, CA
01/2013-05/2014	The HR Manager, LLC (Consultant)	San Rafael, CA

Education:
Duke University, BA, 1982
University of California, Berkeley, MBA, 1988

Year of Birth: 1960

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2016

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Kathryn Peyton has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Kathryn Peyton does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Kathryn Peyton is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Kathryn Peyton adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as policies and procedures outlined in the firm's Code of Ethic and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Jason Pollens

Personal CRD # 7477243 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
11/2021-Present	Abacus Wealth Partners (Advisor)	Sebastopol, CA
01/2015-10/2021	Jewish Vocational Service (Manager of Economic Opportunity)	Boston, MA
02/2014-07/2015	Roxbury Center for Financial Empowerment (Volunteer Financial Counselor and Tax Preparer)	Boston, MA
05/2014-01/2015	Bethany Health Care Center (Mission Advancement Assistant)	Framingham, MA
10/2013-01/2014	Unemployed	Boston, MA
11/2012-09/2013	Northeastern University (Program Manager for Education and Dialogue)	Boston, MA
09/2010-05/2012	Brandeis University (Student)	Waltham, MA

Education:
Brandeis University, MA, 2012
Clark University, BA, 2006

Year of Birth: 1983

Professional Designations:
Certified Student Loan Professional (CSLP®)
Certified Financial Planner (CFP®)
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial

planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
None

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Jason Pollens has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Jason Pollens does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Jason Pollens is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Jason Pollens adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Barrett Sean Porter

Personal CRD # 4257687 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
02/2022 - Present	Abacus Wealth Partners (Chief of Advisors, Partner & Advisor)	Santa Monica, CA
07/2009-02/2022	Abacus Wealth Partners (Partner, Advisor)	Santa Monica, CA

Year of Birth: 1974

Education:
America River College, 1993-1994
San Diego Community College, 1995-1998

San Diego State University, 1992

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board’s other certification marks (the “CFP Board Certification Marks”). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Combined State Law Examination (Series 66), 2001
Uniform Investment Adviser Law Examination (Series 65), 2013

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to client's or a perspective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Barrett Sean Porter has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Barrett Sean Porter does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Barrett Sean Porter is supervised by the firm's Chief Compliance Officer. The Chief Compliance Officer is responsible for ensuring that Barrett Sean Porter adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethic and compliance manual. The Phone number for the Chief Compliance Officer is (310) 566-1888.

Matthew John Rivera
Personal CRD # 5671220 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location

03/2017-Present	Abacus Wealth Partners (Advisor)	San Mateo, CA
12/2016-03/2017	Full-Time Dad	San Carlos, CA
04/2012-12/2016	RS Investments (Head of Client Service)	San Francisco, CA

Education:
University of California, Davis, BS, 2006

Year of Birth: 1984

Professional Designations:
Chartered Financial Analyst (CFA)
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
None

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Matthew John Rivera has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Matthew John Rivera does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Matthew John Rivera is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Matthew John Rivera adheres to all required regulations regarding the activities of an Investment

Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Spencer David Sherman

Personal CRD # 1609423 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
02/2022 – Present	Abacus Wealth Partners (Partner & Advisor)	Sebastopol, CA
01/2004– 02/2022	Abacus Wealth Partners (Co-CEO, Advisor)	Sebastopol, CA
07/1987-12/2003	Sherman Financial, Inc. (Principal, Advisor)	Philadelphia, PA

Education:
Brandeis University, BA, 1983
University of Pennsylvania, MBA, 1987

Year of Birth: 1961

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 1990

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or a prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Spencer David Sherman has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Spencer David Sherman does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Spencer David Sherman is supervised by Neela Hummel, the firm's Co-CEO. Neela Hummel is responsible for ensuring that Spencer David Sherman adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Neela Hummel is (310) 566-1888.

Daniel Raymond Smith

Personal CRD # 6961363 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
07/2022-Present	Abacus Wealth Partners (Advisor)	Santa Monica, CA
06/2019-07/2022	The Vanguard Group, Inc (Registered Person)	Charlotte, NC
03/2019-06/2019	AttainX (Clerical Assistant)	Blacksburg, VA
12/2016-05/2018	Rhino Sports & Entertainment (Security)	Blacksburg, VA
02/2016-12/2016	Virginia Tech Dining Services (Student Assistant Manager)	Blacksburg, VA
05/2015-08/2015	Freiermuth Gymnastics (Assistant Coach)	Naples, ITA

Education:
Virginia Tech; Blacksburg, VA; B.S., 2019

Year of Birth: 1997

Professional Designations:

Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Securities Industry Essentials (SIE), 2019
Uniform Investment Adviser Law Examination (Series 65), 2023

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Daniel Raymond Smith has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Daniel Raymond Smith does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Daniel Raymond Smith is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Daniel Raymond Smith adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Kate Sumner

Personal CRD #: 7392450 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
06/2021-Present	Abacus Wealth Partners (Advisor)	Santa Monia, CA

02/2018-08/2020	Private Family (Nanny)	Durham, NC
10/2017-11/2017	The Spotted Dog (Server)	Carrboro, NC
02/2017-09/2017	Girls Rock NC (Program Director)	Durham, NC
9/2014-12/2016	Smith College (Manuscripts Processor)	Northampton, MA
08/2010-05/2014	Smith College (student)	Northampton, MA

Education:
Smith College, A.B., 2014
Wake Forest University, Certificate in Financial Planning, 2021

Year of Birth: 1992

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2021

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client’s or prospective client’s evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actually engaged. Kate Sumner has no other business activities to report that represent a substantial amount of the supervised person’s time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Kate Sumner does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Kate Sumner is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Kate Sumner adheres to all required regulations regarding the activities of an Investment Adviser

Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Daria Victorov

Personal CRD #: 6199640 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
08/2016-Present	Abacus Wealth Partners (Advisor)	San Mateo, CA
08/2015-08/2016	BlueSky Wealth Advisors, LLC (Wealth Advisor)	Santa Clara, CA
06/2014-08/2015	LifeStream Financial, Inc (Associate Financial Planner)	Santa Clara, CA

Education:
Virginia Tech, BS, 2014

Year of Birth: 1992

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2016

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Daria Victorov has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Daria Victorov does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Daria Victorov is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Daria Victorov adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as policies and procedures outlined in the firm's Code of Ethic and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Christopher Vallejo
Personal CRD # 7332881 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
01/2021 - Present	Abacus Wealth Partners (Advisor)	Santa Monica, CA
11/2018 – 01/2021	Regal Wine Company (Sales Representative)	Los Angeles, CA
08/2018 – 11/2018	Unemployed	Los Angeles, CA
05/2018 – 08/2018	Finish Line (Stock Associate)	Omaha, NE
11/2016 – 05/2018	Wow Me! Events, LLC (Music Director)	Dallas, TX
07/2015 – 05/2018	Zhen Music and Arts Institute (Guitar Instructor)	Dallas, TX
05/2014 – 05/2018	Seld Employed Musician	Dallas, TX
03/2014 – 05/2017	First Baptist Church of Dallas (Music Director)	Dallas, TX

Education:
University of North Texas, BM, 2014

Year of Birth: 1992

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2021

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Christopher Vallejo has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Christopher Vallejo does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Christopher Vallejo is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that is responsible for ensuring that Christopher Vallejo adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Elizabeth Ariel Ward

Personal CRD #: 5401219 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location

03/2019-Present	Abacus Wealth Partners (Advisor)	San Diego, CA
04/2018-02/2019	Workable Wealth (Financial Planner)	San Diego, CA
01/2018-04/2018	A. Ward Financial (Owner, COO)	Charlotte, NC
07/2012-01/2018	FIRST Financial Group (Director of Operations)	Raleigh, NC
07/2007-06/2012	FIRST Financial Group (Paraplanner)	Raleigh, NC

Education:
Lyon College, BS, 2005

Year of Birth: 1982

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2023

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Elizabeth Ariel Ward has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Elizabeth Ariel Ward does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Elizabeth Ariel Ward is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Elizabeth Ariel Ward adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number Barrett Porter is (310) 566-1888.

Katelynn Wiley

Personal CRD # 7433868 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
02/2023-Present	Abacus Wealth Partners (Financial Advisor)	Sebastopol, CA
09/2021 – 01/2023	David C. Walther (Financial Associate)	Novato, CA
09/2018 – 09/2021	Self Employed (Copywriter)	Sebastopol, CA
07/2020 – 06/2021	Potluck Consulting (Copywriter)	Santa Rosa, CA
03/2020 – 07/2020	Unemployed	Petaluma, CA
11/2019 – 03/2020	The Shuckery (Restaurant Server)	Petaluma, CA
02/2019 – 11/2019	Unemployed	Petaluma, CA
03/2018 – 02/2019	Rebuilding Together Petaluma (Fire Recovery Manager)	Petaluma, CA
08/2016 – 02/2018	Friends of the Petaluma River (Program Coorindator)	Petaluma, CA
10/2013 – 08/2016	Della Fattoria (Restaurant Server)	Petaluma, CA

Education:
University of California Berkeley, B.A., 2013

Year of Birth: 1991

Professional Designations:

Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2023

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Katelynn Wiley has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Katelynn Wiley does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Katelynn Wiley is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Katelynn Wiley adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Kyle Andrew Williams
Personal CRD # 2810071 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
09/2013-Present	Abacus Wealth Partners (Advisor)	Sebastopol, CA

Education:

Westmont College, BA, 1998

Year of Birth: 1975

Professional Designations:
Certified Public Accountant (CPA)
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examination Passed:
Uniform Investment Adviser Law Examination (Series 65), 2012

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or a prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Kyle Andrew Williams has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Kyle Andrew Williams does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Kyle Andrew Williams is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Kyle Andrew Williams adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Barbara Wolf

Personal CRD # 4602093 (Investment Representative Adviser)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
07/2009-Present	Abacus Wealth Partners (Advisor)	Philadelphia, PA

Education:
Smith College, BA, 1979
New York University, MBA, 1985

Year of Birth: 1957

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Adviser Law Examination (Series 65), 2001

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or a prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Barbara Wolf has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Barbara Wolf does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Barbara Wolf is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Barbara Wolf adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Lindsey Shea Woodward Rafkind

Personal CRD # 5946324 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
07/2017-Present	Abacus Wealth Partners (Advisor)	Santa Monica, CA
01/2016-07/2017	Dimensional Fund Advisors (Associate)	Santa Monica, CA
11/2011-01/2016	Thornburg Investment Management (Institutional Associate)	Santa Fe, NM

Education:
University of Arizona, BA, 2010
University of New Mexico, MBA, 2012

Year of Birth: 1989

Professional Designations:
Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Combined State Law Examination (Series 66), 2014
Uniform Investment Adviser Law Examination (Series 65), 2023

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Lindsey Shea Woodward Rafkind has no other business activities to report that represent a substantial amount of

the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Lindsey Shea Woodward Rafkind does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Lindsey Shea Woodward Rafkind is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Lindsey Shea Woodward Rafkind adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Jacqueline Worstell

Personal CRD # 7670057 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
11/2022-Present	Abacus Wealth Partners (Advisor)	Santa Monica, CA
01/2018-10/2022	Cheryl R Worstell, CPA (Tax Accountant)	Cupertino, CA
06/2022-08/2022	Abacus Wealth Partners (Intern)	Santa Monica, CA
01/2016-11/2017	G & J Seiberlich & Co, LLP (Staff Accountant)	Napa, CA
09/2013-06/2016	Pacific Union College (Student)	Angwin, CA

Education:
Pacific Union College, Angwin, CA, BBA, 2016

Year of Birth: 1992

Professional Designations:

Certified Financial Planner (CFP®) professional
I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and I may use these and CFP Board’s other certification marks (the “CFP Board Certification Marks”). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the 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 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.

Industry Examinations Passed:
Uniform Investment Advisor Law Examination (Series 65), 2023

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Jacqueline Worstell is also a tax and accounting professional. Implementations of tax and accounting recommendations are separate and apart from Jacqueline Worstell's role with Abacus Wealth Partners. As a tax and accounting professional, Jacqueline Worstell will receive customary pay from the CPA company. Jacqueline Worstell is not required to offer the services of any particular CPA company. Compensation generated by tax and accounting sales do not offset regular advisory fees. This practice presents a conflict of interest in recommending certain services of the CPA company. Clients are under no obligation to implement any recommendations made by Jacqueline Worstell.

Item 5: Additional Compensation
Jacqueline Worstell does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Jacqueline Worstell is supervised by Barrett Porter, Chief of Advisors. Barrett Porter is responsible for ensuring that Jacqueline Worstell adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Barrett Porter is (310) 566-1888.

Walter Yu

Personal CRD # 5596790 (Investment Adviser Representative)

Item 2: Educational Background and Business Experience

Employment Dates	Employer Name	Employer Location
3/2022 – Present	Abacus Wealth Partners (Director of Portfolio Management)	Santa Monica, CA
05/2014-03/2022	Abacus Wealth Partners (Trader)	Santa Monica, CA
09/2012-04/2014	Unemployed	Los Angeles, CA

Education:
University of California, Los Angeles, BA, 2007

Year of Birth: 1986

Professional Designations:
Uniform Investment Adviser Law Examination (Series 65), 2015

Industry Examinations:
Proprietary Trader Examination (Series 56), 2011
Uniform Investment Adviser Law Examination (Series 65), 2015

Item 3: Disciplinary Information
There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities
Registered investment advisers are required to disclose any other business activity or occupation in which the supervised person is actively engaged. Walter Yu has no other business activities to report that represent a substantial amount of the supervised person's time and income where it would potentially create a conflict of interest to clients.

Item 5: Additional Compensation
Walter Yu does not receive any economic benefit from any person, company, or organization, other than Abacus Wealth Partners in exchange for providing clients advisory services through Abacus Wealth Partners.

Item 6: Supervision
As a representative of Abacus Wealth Partners, Walter Yu is supervised by the firm's Chief Compliance Officer. The Chief Compliance Officer is responsible for ensuring that Walter Yu adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics

and compliance manual. The phone number for the Chief Compliance Officer is (310) 566-1888.