

**ITEM 1: COVER PAGE FOR PART 2B OF FORM ADV:
BROCHURE SUPPLEMENT
May 2026**

Anthony S. D'Amico



**7530 Lucerne Drive, Suite 400
Middleburg Heights, OH 44130
(440) 572-5552
www.FidatoWealth.com**

This brochure supplement provides information about Mr. D'Amico that supplements our brochure. You should have received a copy of that brochure. Please contact us by email at compliance@fidatowealth.com if you did not receive Fidato Wealth LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. D'Amico is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD # 5753413.

Item 2: Educational Background & Business Experience

Anthony S. D'Amico

Year of Birth: 1975

Formal Education:

- Graduated Cum Laude January 15, 1998 from John Carroll University; Bachelor of Science in Organizational Psychology; University Heights, Ohio USA
- 2015: Boston University Financial Planning Program

Business Background:

- 12/2008 to Present Fidato Wealth LLC; Middleburg Heights, Ohio USA; Founder & Managing Partner
- 01/2010 to 08/2011 Brookstone Capital Management, LLC; Investment Advisor
- 09/2008 to 01/2013 Integrity Properties LLC; Brook Park, Ohio USA; Founder & President
- 01/2006 to 01/2013 A. Valente Properties LLC; Brook Park, Ohio USA; Founder & President

Exams, Licenses & Other Professional Designations:

- 2025: Certified Exit Planning Advisor (CEPA)
- 2016: CERTIFIED FINANCIAL PLANNER, CFP®
- 2010: Series 65 Exam
- 1999: Ohio Life, Long Term Care, & Health Insurance License

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”). The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 71,000 individuals have obtained CFP® certification in the United States.

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

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

- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

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

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

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

Certified Exit Planning Advisor (CEPA)

The CEPA designation is made available through the Exit Planning Institute (“EPI”). Candidates must have or be: (1) 5 years of full-time or equivalent experience working directly with business owners as a financial advisor, attorney, CPA, business broker, investment banker, commercial lender, estate planner, insurance professional, business consultant or in a related capacity; (2) Undergraduate degree from a qualifying institution; if no qualifying degree must submit additional professional work experience (2 years of relevant professional experience may be substituted for each year of required undergraduate studies); and (3) Exit Planning Institute member in good standing. The CEPA Program offers professionals an innovative learning experience, performance-enhancing resources, and the strategic tools to help advance their exit planning practice.

Renewing certificants must have completed a minimum of 40 hours of exit planning related professional development, or a minimum of 30 hours of exit planning related professional development plus 10 hours of qualifying leadership, authorship, and teaching activities contributing to the exit planning profession. Qualifying leadership activities include volunteer service as a chairman, Chair-Elect, or officer for committee service to a qualifying organization other than the applicant's employer. Renewal applicants must again agree in writing that they will adhere to the EPI Professional Standards and Code of Ethics, and must re-attest that they have not been convicted of a felony related to the practice of exit planning.

Item 3: Disciplinary Information¹

There are no legal or disciplinary events material to the evaluation of Mr. D’Amico.

Item 4: Other Business Activities

Fidato Wealth LLC is also a licensed insurance agency in the State of Ohio, through which Mr. D’Amico is a licensed insurance agent, and in such capacity, may recommend, on a commission basis, the purchase of certain insurance products. A conflict of interest exists to the extent that our firm recommends the purchase of insurance products where Mr. D’Amico receives insurance commissions or other additional compensation. He spends less than 5% of his time on these activities. Our firm’s clients are never under any obligation to purchase insurance products from Fidato Wealth LLC in its separate capacity as an insurance agency, or from Mr. D’Amico in his capacity as a licensed insurance agent. Fidato Wealth LLC pledges to use fixed life insurance products only when deemed

to be in the clients' best interest.

Item 5: Additional Compensation

Mr. D'Amico does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Ian McDonald, Chief Compliance Officer of Fidato Wealth LLC, is responsible for compliance program oversight, with Anthony D'Amico supervising and monitoring to ensure compliance with our firm's Code of Ethics. Please contact us if you have any questions about Mr. D'Amico's brochure supplement at 440-572-5552.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Mr. D'Amico to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Mr. D'Amico to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

ITEM 1: COVER PAGE
PART 2B OF FORM ADV: BROCHURE SUPPLEMENT
May 2026

Marissa G. Beyer



7530 Lucerne Drive, Suite 400
Middleburg Heights, OH 44130
(440) 572-5552
www.FidatoWealth.com

This brochure supplement provides information about Ms. Beyer that supplements our brochure. You should have received a copy of that brochure. Please contact us by email at compliance@fidatowealth.com if you did not receive Fidato Wealth LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. Beyer is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD # 5003332.

Item 2: Educational Background & Business Experience

Marissa Grace Beyer

Year of Birth: 1982

Education Background:

- 2005: Edinboro University; Bachelor of Science in Business

Business Background:

- 08/2020 – Present Fidato Wealth LLC; Partner & Senior Wealth Advisor
- 07/2015 – 08/2020 True Wealth Design; Senior Wealth Advisor
- 10/2005 – 06/2015 RAV Financial Services; Associate Advisor/Advisor

Exams, Licenses & Other Professional Designations:

- 06/2005: Ohio Life & Health Insurance
- 2010: CERTIFIED FINANCIAL PLANNER, CFP®

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- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

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

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

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

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

Item 3: Disciplinary Information¹

There are no legal or disciplinary events material to the evaluation of Ms. Beyer.

Item 4: Other Business Activities

Ms. Beyer is a licensed insurance agent registered in the state of Ohio. She may offer fixed life insurance products and receive normal and customary commissions because of these transactions. A conflict of interest may arise as these commissionable insurance sales may create an incentive to recommend products based on the compensation they may earn. Fidato Wealth LLC pledges to use fixed life insurance products only when deemed to be in the clients’ best interest. Our firm’s clients are never under any obligation to purchase insurance products from Fidato Wealth LLC in its separate capacity as an insurance agency or from a licensed insurance agent at our firm.

Item 5: Additional Compensation

Ms. Beyer does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Ian McDonald, Chief Compliance Officer of Fidato Wealth LLC, is responsible for compliance program oversight, with Anthony D’Amico supervising and monitoring to ensure compliance with our firm’s Code of Ethics. Please contact us if you have any questions about Ms. Beyer’s brochure supplement at 440-572-5552.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Ms. Beyer to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Ms. Beyer to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

ITEM 1: COVER PAGE
PART 2B OF FORM ADV: BROCHURE SUPPLEMENT
May 2026

Brian Eberhardt



7530 Lucerne Drive, Suite 400
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www.FidatoWealth.com

This brochure supplement provides information about Mr. Eberhardt that supplements our brochure. You should have received a copy of that brochure. Please contact us by email at compliance@fidatowealth.com if you did not receive Fidato Wealth LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Eberhardt is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD # 6610764.

Item 2: Educational Background & Business Experience

Brian Eberhardt

Year of Birth: 1982

Education Background:

- 2011: Cleveland State University; Bachelor of Business Administration in Finance
- 2018: Northwestern University; Financial Planning Program

Business Background:

- 10/2015 – Present Fidato Wealth LLC; Partner & Lead Wealth Advisor
- 07/2013 – 09/2015 PNC Capital Advisors, LLC; Senior Advisor Operations Analyst
- 08/2012 – 07/2013 PNC Wealth Management; Operations Analyst
- 04/2011 – 08/2012 Apprisen Financial; Financial Counselor
- 07/2005 – 04/2011 The Ciulla Group; Staff Accountant

Exams, Licenses & Other Professional Designations:

- 2016: Series 65 Exam

Item 3: Disciplinary Information¹

There are no legal or disciplinary events material to the evaluation of Mr. Eberhardt.

Item 4: Other Business Activities

Mr. Eberhardt does not have any outside business activities to report.

Item 5: Additional Compensation

Mr. Eberhardt does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Ian McDonald, Chief Compliance Officer of Fidato Wealth LLC, is responsible for compliance program oversight, with Anthony D’Amico supervising and monitoring to ensure compliance with our firm’s Code of Ethics. Please contact us if you have any questions about Mr. Eberhardt’s brochure supplement at 440-572-5552.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Mr. Eberhardt to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Mr. Eberhardt to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

**ITEM 1: COVER PAGE FOR PART 2B OF FORM ADV:
BROCHURE SUPPLEMENT
May 2026**

Daniel Yergan



**7530 Lucerne Drive, Suite 400
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www.FidatoWealth.com**

This brochure supplement provides information about Mr. Yergan that supplements our brochure. You should have received a copy of that brochure. Please contact us by email at compliance@fidatowealth.com if you did not receive Fidato Wealth LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Yergan is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD # 6950444.

Item 2: Educational Background & Business Experience

Daniel Yergan

Year of Birth: 1994

Formal Education:

- 2021 to 2023: Kansas State University; MS in Personal Financial Planning; Financial Planning
- 2015 to 2019: Youngstown State University; BS in Business Administration; Financial Planning
- 2013 to 2015: Global University; Ministerial Studies

Business Background:

- 10/2024 – Present Fidato Wealth LLC; Wealth Advisor
- 05/2023 – 10/2024 Fidato Wealth LLC; Associate Wealth Advisor
- 05/2018 to 05/2023 Valmark Financial Group; Financial Planner
- 07/2010 to 10/2019 Production Packaging; Product Specialist
- 01/2018 to 04/2018 Treloar & Heisel; Wealth Management Intern
- 05/2017 to 12/2017 Trumbull Industries; Business Analyst
- 05/2016 to 08/2017 Youngstown Business Incubator; Marketing Consultant
- 04/2012 to 08/2017 Creative Stream Marketing; Email Marketing Specialist

Exams, Licenses & Other Professional Designations:

- 2021: Certified Financial Planner™ (CFP®)
- 2020: Series 66 Exam
- 2020: Series 24 Exam
- 2020: Series 7 Exam
- 2019: Securities Industry Essentials (SIE)
- 2019: Life, Accident, & Health Insurance License

CERTIFIED FINANCIAL PLANNER™, CFP®

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Item 3: Disciplinary Information¹

There are no legal or disciplinary events material to the evaluation of Mr. Yergan.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Mr. Yergan to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Mr. Yergan to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Item 4: Other Business Activities

Mr. Yergan does not have any outside business activities to report.

Item 5: Additional Compensation

Mr. Yergan does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Ian McDonald, Chief Compliance Officer of Fidato Wealth LLC, is responsible for compliance program oversight, with Anthony D'Amico supervising and monitoring to ensure compliance with our firm's Code of Ethics. Please contact us if you have any questions about Mr. Yergan's brochure supplement at 440-572-5552.

**ITEM 1: COVER PAGE FOR PART 2B OF FORM ADV:
BROCHURE SUPPLEMENT
May 2026**

Brennan Thiergartner



**7530 Lucerne Drive, Suite 400
Middleburg Heights, OH 44130
(440) 572-5552
www.FidatoWealth.com**

This brochure supplement provides information about Mr. Thiergartner that supplements our brochure. You should have received a copy of that brochure. Please contact us by email at compliance@fidatowealth.com if you did not receive Fidato Wealth LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Thiergartner is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD # 6928799.

Item 2: Educational Background & Business Experience

Brennan Thiergartner

Year of Birth: 1998

Formal Education:

- 2017 to 2021: The University of Akron; College of Business Financial Planning Major

Business Background:

- 10/2024 – Present Fidato Wealth LLC; Associate Wealth Advisor & Financial Planning Specialist
- 07/2022 – 10/2024 Fidato Wealth LLC; Financial Planning Specialist
- 05/2020 to 07/2022 Fidato Wealth LLC; Client Associate
- 05/2019 to 05/2020 Brookside Landscape Construction Services; Landscaper/Laborer
- 08/2018 to 05/2019 The University of Akron; Student
- 05/2018 to 08/2018 Brookside Landscape Construction Services; Landscaper/Laborer
- 08/2017 to 05/2018 The University of Akron; Student
- 04/2012 to 05/2017 Buckeye Local Schools; Student

Exams, Licenses & Other Professional Designations:

- 2023: Certified Financial Planner™ (CFP®)
- 2022: Series 65 Exam
- 2018: Life & Health Insurance License

CERTIFIED FINANCIAL PLANNER™, CFP®

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Item 3: Disciplinary Information¹

There are no legal or disciplinary events material to the evaluation of Mr. Thiergartner.

Item 4: Other Business Activities

Mr. Thiergartner does not have any outside business activities to report.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Mr. Thiergartner to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Mr. Thiergartner to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Item 5: Additional Compensation

Mr. Thiergartner does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Ian McDonald, Chief Compliance Officer of Fidato Wealth LLC, is responsible for compliance program oversight, with Anthony D'Amico supervising and monitoring to ensure compliance with our firm's Code of Ethics. Please contact us if you have any questions about Mr. Thiergartner's brochure supplement at 440-572-5552.

ITEM 1: COVER PAGE
PART 2B OF FORM ADV: BROCHURE SUPPLEMENT
May 2026

Amy J. D'Amico



7530 Lucerne Drive, Suite 400
Middleburg Heights, OH 44130
(440) 572-5552
www.FidatoWealth.com

This brochure supplement provides information about Ms. D'Amico that supplements our brochure. You should have received a copy of that brochure. Please contact us by email at compliance@fidatowealth.com if you did not receive Fidato Wealth LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Ms. D'Amico is available on the SEC's website at www.adviserinfo.sec.gov by searching CRD # 6126277.

Item 2: Educational Background & Business Experience

Amy J. D'Amico

Year of Birth: 1969

Education Background:

- 1991: University of Dayton; Bachelor of Arts in Psychology
- 2001: Ursuline College; Master's Degree in Art Therapy

Business Background:

- 06/2009 – Present Fidato Wealth LLC; Managing Partner
- 10/2007 – 06/2009 Pleasant Lake Villa; Social Worker
- 08/1999 – 10/2007 Applewood Centers; Art Therapist

Exams, Licenses & Other Professional Designations:

- 2025: Certified Exit Planning Advisor (CEPA)
- 2012: Series 65 Exam

Certified Exit Planning Advisor (CEPA)

The CEPA designation is made available through the Exit Planning Institute (“EPI”). Candidates must have or be: (1) 5 years of full-time or equivalent experience working directly with business owners as a financial advisor, attorney, CPA, business broker, investment banker, commercial lender, estate planner, insurance professional, business consultant or in a related capacity; (2) Undergraduate degree from a qualifying institution; if no qualifying degree must submit additional professional work experience (2 years of relevant professional experience may be substituted for each year of required undergraduate studies); and (3) Exit Planning Institute member in good standing. The CEPA Program offers professionals an innovative learning experience, performance-enhancing resources, and the strategic tools to help advance their exit planning practice.

Renewing certificants must have completed a minimum of 40 hours of exit planning related professional development, or a minimum of 30 hours of exit planning related professional development plus 10 hours of qualifying leadership, authorship, and teaching activities contributing to the exit planning profession. Qualifying leadership activities include volunteer service as a chairman, Chair-Elect, or officer for committee service to a qualifying organization other than the applicant's employer. Renewal applicants must again agree in writing that they will adhere to the EPI Professional Standards and Code of Ethics, and must re-attest that they have not been convicted of a felony related to the practice of exit planning.

Item 3: Disciplinary Information¹

There are no legal or disciplinary events material to the evaluation of Ms. D'Amico.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Ms. D'Amico to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Ms. D'Amico to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

Item 4: Other Business Activities

Ms. D'Amico does not have any outside business activities to report.

Item 5: Additional Compensation

Ms. D'Amico does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Ian McDonald, Chief Compliance Officer of Fidato Wealth LLC, is responsible for compliance program oversight, with Anthony D'Amico supervising and monitoring to ensure compliance with our firm's Code of Ethics. Please contact us if you have any questions about Ms. D'Amico's brochure supplement at 440-572-5552.

ITEM 1: COVER PAGE
PART 2B OF FORM ADV: BROCHURE SUPPLEMENT
August 2026

Andrew Outcalt



7530 Lucerne Drive, Suite 400
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Item 2: Educational Background & Business Experience

Andrew Joseph Outcalt

Year of Birth: 1996

Education Background:

- 2016 to 2019: Ohio Wesleyan University; Bachelor of Arts in Finance Economics and minor in Accounting

Business Background:

- 08/2026 to Present Fidato Wealth LLC; Wealth Advisor
- 08/2024 to 07/2026 Cary Stamp & Company; Advisor
- 08/2024 to 07/2026 Commonwealth Financial Network; Advisor
- 05/2021 to 08/2024 J.P. Morgan Securities LLC; Client Associate
- 05/2021 to 08/2024 J.P. Morgan Chase Bank, N.A.; Client Associate
- 08/2019 to 05/2021 UBS; Asset Management and Operations Analyst

Exams, Licenses & Other Professional Designations:

- 2025: Accredited Investment Fiduciary (AIF®)
- 2025: Certified Plan Fiduciary Advisor (CPFA)
- 2024: Certified Financial Planner™ (CFP®)
- 2021: Series 7 & 66 Exams
- 2020: SIE

CERTIFIED FINANCIAL PLANNER™, CFP®

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Accredited Investment Fiduciary (AIF®)

The AIF® designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF® designation, individuals must complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the AIF® Code of Ethics. In order to maintain the AIF® designation, the individual must annually renew their affirmation of the AIF Code of Ethics and complete six hours of continuing education credits. The certification is administered by the Center for Fiduciary Studies, LLC (a Fiduciary360 (fi360) company).

Certified Plan Fiduciary Advisor (CPFA)

The CPFA credential demonstrates an advisor's knowledge, expertise and commitment to working with retirement plans. Plan advisors who earn their CPFA demonstrate the expertise required to act as a plan fiduciary or help plan fiduciaries manage their roles and responsibilities. To earn the CPFA credential

candidates must pass the CPFA examination. CPFA coursework covers four key areas: 1. ERISA Fiduciary Roles and Responsibilities, 2. ERISA Fiduciary Oversight, 3. ERISA Plan Investment Management, and 4. ERISA Plan Management. The CPFA examination and standards are set by the National Association of Plan Advisors ("NAPA"). Following completion of the CPFA examination, 10 hours of continuing education on ethics/professionalism topic(s) are required annually to maintain the certification. Failure to earn continuing education credits will result in plan advisors CPFA certification being suspended until the appropriate continuing education credits are completed within the following year (i.e., plan advisors have 24 months to catch up for the entire 24 months' worth of continuing education if they fall behind any time within that period).

Item 3: Disciplinary Information¹

There are no legal or disciplinary events material to the evaluation of Mr. Outcalt.

Item 4: Other Business Activities

Mr. Outcalt does not have any outside business activities to report.

Item 5: Additional Compensation

Mr. Outcalt does not receive any other economic benefit for providing advisory services in addition to advisory fees.

Item 6: Supervision

Ian McDonald, Chief Compliance Officer of Fidato Wealth LLC, is responsible for compliance program oversight, with Anthony D'Amico supervising and monitoring to ensure compliance with our firm's Code of Ethics. Please contact us if you have any questions about Mr. Outcalt's brochure supplement at 440-572-5552.

¹ Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Mr. Outcalt to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Mr. Outcalt to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.