

Brochure Supplement

February 2024

Creekmur Asset Management, LLC

CRD No. 306903

Clark D. Randall, CFP® , AIF® , CRPC® , CLU® Wealth Advisor

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This brochure supplement provides information about Clark D. Randall that supplements the Creekmur Asset Management, LLC brochure. You should have received a copy of that brochure. If you did not receive a brochure or if you have any questions about the contents of this supplement, please contact us at 309-925-2043 or email john@creekmurwealth.com.

Additional information about Clark D. Randall is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background and Business Experience

Clark D. Randall, CFP®, AIF®, CRPC®, CLU®

Year of Birth: 1963

A. Educational Background

1985: Texas A&M University; B.A. Finance

B. Business Background

Creekmur Asset Management, LLC, *Director of Financial Planning*, 03/2023–Present

AE Financial Services, LLC, *Registered Representative*, 03/2023–12/23

Cambridge Investment Research Advisors, Inc., *Registered Representative*, 12/2010–03/2023

Cambridge Investment Research, Inc., *Investment Adviser Representative*, 12/2010–03/2023

Lincoln National Life, *Financial Planner*, 01/2001–12/2010

Lincoln Financial Advisors, *Financial Planner*, 01/2001–12/2010

Pruco Securities Corporation, 11/1986–01/2001

C. Professional Designations

Minimum Qualifications for The CERTIFIED FINANCIAL PLANNER™ Designation.

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.

Minimum Qualifications for the Accredited Investment Fiduciary® (AIF®) Designation.

AIF is offered by the Center for Fiduciary Studies, LLC, a Fiduciary360 (fi360) company. The AIF® training curriculum is offered via a web based program or a blended learning option. A candidate must successfully complete the training curriculum and an examination in order to file for the AIF designation. All designees must attest to both a Code of Ethics and Conduct Standards.

Minimum Qualifications for the Chartered Retirement Planning Counselor (CRPC)

The CRPC program is administered by the College for Financial Planning. Individuals who hold the CRPC® designation have completed a course of study encompassing pre-and post-retirement needs, asset management, estate planning and the entire retirement planning process using models and techniques from real client situations. Additionally, individuals must pass an end-of-course examination that tests their ability to synthesize complex concepts and apply theoretical concepts to real-life situations. All designees have agreed to adhere to Standards of Professional Conduct and are subject to a disciplinary process. Designees renew their designation every two-years by completing 16 hours of continuing education, reaffirming adherence to the Standards of Professional Conduct and complying with self-disclosure requirements.

Minimum Qualifications for the Chartered Life Underwriter® (CLU®)

This designation is offered by The American College. This is a professional designation for individuals who specialize in life insurance and estate planning. Current applicants must complete five core courses and three elective courses, and successfully pass all eight two-hour, 100- question examinations in order to receive the designation. Candidates must also meet experience requirements and ethics standards, and agree to comply with The American College Code of Ethics and Procedures. Three years of full-time business experience is required. The three-year period must be within the five years preceding the date of the award.

Item 3: Disciplinary Information

Clark D. Randall does not have any disciplinary action to report. Public information concerning his registration as an investment advisor representative may be found by accessing the SEC's public disclosure site at www.adviserinfo.sec.gov.

Item 4: Other Business Activities

Clark D. Randall is licensed insurance agent and may recommend insurance products offered by various insurance carriers. Please be advised that there is a conflict of interest in that there is an economic incentive to recommend insurance carriers and products based on the compensation to be earned. Please also be advised that Mr. Randall strives to put his clients' interest first and foremost, and clients are not obligated to purchase insurance products through him.

Item 5: Additional Compensation

Clark D. Randall does not receive additional compensation from the activities described in Item 4 above.

Item 6: Supervision

Clark D. Randall is supervised through a compliance program designed to prevent and detect violations of the federal and state securities laws. Supervision is conducted by the Chief Compliance Officer, John Creekmur, who is responsible for administering the policies and procedures. As Chief Compliance Officer, John Creekmur reviews those policies and procedures annually for their adequacy and the effectiveness of their implementation. All policies and procedures of the firm are followed.

John may be reached at 309-925-2043.