

## **Brochure Supplement**

February 2024

### **Creekmur Asset Management, LLC**

CRD No. 306903

**John M. Creekmur, CFP®**

**Managing Member**

Individual CRD No. 2226377

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This brochure supplement provides information about John M. Creekmur 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](mailto:john@creekmurwealth.com).

Additional information about John M. Creekmur is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Item 2: Educational Background and Business Experience

John M. Creekmur

Year of Birth: 1969

### A. Educational Background

1991: Cedarville University, B.A. Finance

2011: Robert Morris University, M.B.A

### B. Business Background

Creekmur Asset Management, LLC, *Managing Member*, 12/2019-Present

Creekmur Inc., dba Creekmur Wealth Advisors, *President*, 06/2008-Present

AE Wealth Management, *Investment Adviser Representative*, 10/2017–06/2020

Madison Avenue Securities, *Registered Representative*, 10/2017–05/2020

Creative Financial Designs, *Investment Adviser Representative*, 04/1999-10/2017

CFD Investments, *Registered Representative*, 05/1998–10/2017

Creekmur Asset Management, *Sole Proprietor/Investment Adviser Representative*, 08/1996-06/2008

### 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](http://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.

### **Item 3: Disciplinary Information**

John Creekmur 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](http://www.adviserinfo.sec.gov).

### **Item 4: Other Business Activities**

John Creekmur is President of and a licensed insurance agent with Creekmur Inc., dba Creekmur Wealth Advisors, through which he 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 other investment products offered through such insurance carriers. Please also be advised that John Creekmur strives to put his clients' interests first and foremost, and clients are not obligated to purchase insurance products through him.

John Creekmur is a <5% owner of Inspire Impact Group, LLC, which has five publicly traded ETFs listed on the NYSE. Creekmur owns some Inspire Impact Group's ETFs in several of its managed accounts. Prospective clients are advised that Creekmur has an economic interest in recommending ETF securities from Inspire Impact Group. Please note that clients are under no obligation to utilize such ETFs or purchase securities from Creekmur's affiliate.

### **Item 5: Additional Compensation**

John Creekmur receives additional compensation through his business activities described in Item 4 above.

### **Item 6: Supervision**

John Creekmur is Chief Compliance Officer of Creekmur Asset Management, LLC . He supervises and oversees all activities conducted through the firm and maintains policies and procedures to guide his activities. John Creekmur reviews those policies and procedures annually for their adequacy and the effectiveness of their implementation.

John may be reached at 720-420-4876.