

Brochure Supplement

February 2024

Creekmur Asset Management, LLC

CRD No. 306903

Nicole A. Geraci, CFP®, AWMA®, RP® Wealth Advisor

Individual CRD No. 6218985

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This brochure supplement provides information about Nicole A. Geraci 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 Nicole A. Geraci is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background and Business Experience

Nicole A. Geraci (b. 1982) is a Wealth Advisor at Creekmur Asset Management, LLC.

A. Educational Background

Master of Accounting; University of Colorado	Present
CERTIFIED FINANCIAL PLANNER™, College for Financial Planning	2011
Accredited Wealth Management Advisor, College for Financial Planning	2009
Registered Paraplanner, College for Financial Planning	2008
BA Economics and Political Science, DePaul University	2006

B. Business Background

Creekmur Asset Management, LLC, <i>Wealth Advisor</i>	07/2022–Present
Royal Electric, LLC, <i>Co-Owner</i>	09/2015–Present
Rocky Mountain Planning Group, Inc., <i>Financial Planner</i>	02/2008–08/2022

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.

Accredited Wealth Management Advisor (AWMA®)

This designation is awarded from the College of Financial Planning to investment professionals who complete its 15 module AWMA Professional Education Program. The course is estimated to require approximately 120 hours of study prior to taking the exam. After passing the exam, each individual must commit to a code of ethics and agree to pursue 16 hours of continuing education every two years.

Registered Paraplanner (RP®)

This designation is awarded from the College of Financial Planning to investment professionals who complete its 10 module Registered Paraplanner Professional Education Program. The course is estimated to require approximately 80 hours of study prior to taking the exam. After passing the exam, each individual must commit to a code of ethics and agree to pursue 16 hours of continuing education every two years.

Item 3: Disciplinary Information

Nicole A. Geraci does not have any disciplinary action to report. Public information concerning her registration as an investment advisor or representative may be found by

accessing the SEC's public disclosure site at www.adviserinfo.sec.gov.

Item 4: Other Business Activities

Nicole A. Geraci 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 Ms. Geraci strives to put her clients' interest first and foremost, and clients are not obligated to purchase insurance products through her.

Item 5: Additional Compensation

Nicole A. Geraci receives additional compensation through the activities listed above.

Item 6: Supervision

Supervision of Nicole A. Geraci is performed by John Creekmur, in his capacity as Chief Compliance Officer. John can be reached at 309-925-2043.