



FIDERE®

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FIDERE ADVISORS, LLC

Form ADV 2B – Christopher Gerber

REVISED AS OF June 27, 2023



Fidere Advisors, LLC
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(833) 2-FIDERE
www.fidereadvice.com

This Brochure provides information about the education, experience and general background of Aaron Kolkman, MSF, CFP®, CKA® related to his affiliation with Fidere Advisors, LLC (“FIDERE”) as an Investment Advisory Representative (IAR). If you have any questions about the contents of this Brochure, please contact us at (833) 2-FIDERE. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission (“SEC”) or by any state securities authority. This information has been filed with each state requiring such information related to FIDERE and its IARs.

Additional information about FIDERE (CRD No. 312675), including a copy of its Form ADV Part 1, is available on the SEC's website at www.adviserinfo.sec.gov.

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Item 2 – Educational Background & Business Experience

EDUCATION

Bachelor of Science, Bradley University (1974-1978)

Chartered Financial Analyst, CFA Institute (1995)

RECENT EXPERIENCE

Portfolio Manager, Fidere Advisors, LLC (2021 – Present)

Portfolio Manager, Strategic Wealth Group, LLC (2018 – 2020)

Registered Representative, LPL Financial (2007 – 2018)

OTHER EXPERIENCE

Registered Representative, IAR, First MidAmerica Investment Advisors (2005 – 2007)

Registered Representative, Regional Director, Lincoln National Advisors/Sagemark Consulting (1999-2005)

Registered Representative, Metropolitan Life (1994 – 1999)

Registered Representative, Royal Alliance Associates (1989 – 1994)

Registered Representative, Integrated Resources, Inc. (1988 – 1989)

Registered Representative, Piper Jaffray & Hopwood, Inc. (1987 – 1988)

Registered Representative, Paine Webber, Inc. (1983 – 1987)



To earn the CFA charter you must have four years of qualifying investment work experience; you must become a member of CFA Institute (the global association of investment professionals that administers the CFA charter), pledging to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis; you must apply for membership to a local CFA member society; and you must complete the CFA Program. The CFA Program is a globally recognized, graduate-level curriculum that provides you with a strong foundation of the real-world investment analysis and portfolio management skills and practical knowledge you need in today's investment industry. It also emphasizes the highest ethical and professional standards. The Program is organized into three levels, each culminating in a six-hour exam. CFA Program candidates report dedicating in excess of 300 hours of study per level. Completing the entire Program is a significant challenge that takes most candidates between two and five years to complete.

Item 3 –Disciplinary Information

None of our advisory representatives has any disciplinary history.

Item 4 – Other Business Activities

Christopher Gerber is the owner of Beautiful Light, LLC, a photography company unrelated to the business of FIDERE. Christopher Gerber is a CFA question writer at Kaplan, Inc., unrelated to the business of FIDERE.

Item 5 – Additional Compensation

As an IAR, Christopher Gerber is also eligible for health insurance benefits (where offered), profit-sharing, and reimbursement of certain tuition and other industry-related educational expenses necessary for continuing education and professional development. Other business expenses such as meals/entertainment may be approved according to current firm policies for IARs.

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Item 6 – Supervision

Aaron Kolkman is the Designated Compliance Person for FIDERE and is therefore responsible for maintaining compliance supervision of the firm and all its Associates, including himself. Aaron Kolkman may be reached directly at (833) 234-3373 ext. 201.

Item 7 – Requirements for State-Registered Advisers

None of our advisory representatives have disclosures with respect to liability above \$2,500 or any award (or otherwise being found liable) in a civil, self-regulatory organization (SRO) or administrative proceeding, involving any of the following: an investment or an investment-related business or activity, fraud, false statements, omissions, theft, embezzlement, or other wrongful taking of property, bribery, forgery, counterfeiting, or extortion, or dishonest, unfair or unethical practices.

None of our advisory representatives have disclosures with respect to bankruptcy.