

SEC Form ADV Part 2B Brochure Supplements

Michael J. Chasnoff
Samuel A. Chasnoff
Steven T. Condon
Scott M. Keller
Ryan J. Klekar
Christopher M. Meyer
Lauren M. Niestradt
W. Ted Parchman



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These brochure supplements provide information about supervised persons listed above that supplement the Truepoint Institutional Advisors (“Truepoint” or “Firm”) brochure. You should have received a copy of that brochure.

Explanations of the minimum qualifications required for professional designations held by supervised persons at Truepoint are provided at the end of each brochure supplement. The explanations are provided to assist you in understanding the value of each designation.

Please contact James Hadaway, Chief Compliance Officer, at 513-792-6648 or Compliance@truepointwealth.com if you did not receive Truepoint’s brochure or if you have any questions about the contents of this supplement.

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SEC Form ADV Part 2B

Michael J. Chasnoff (b. 1959)

Educational Background:

B.S. in Finance, University of Texas, 1982

Business Experience:

April 2024 – Present:

Founder & Chairman, Truepoint Wealth Counsel

August 1990 – March 2024:

CEO & Founder, Truepoint Wealth Counsel

Explanation of Professional Designations: None.

Disciplinary Information: None.

Other Business Activities:

Foundation Board Member, Summit Country Day School

Board Member, Cincinnati Art Museum

Board Member and Treasurer, Karen Wellington Foundation

Foundation Board Member, Interact For Health

Additional Compensation: None.

Supervision:

As Chief Executive Officer & Shareholder, Steve Condon is primarily responsible for supervision of our employees' advisory activities and advice provided to our clients. James Hadaway is the firm's Chief Compliance Officer. We have written policies and procedures, which include the use of investment policy statements signed by both the client and the advisor, restrictions on employee personal trading and prohibitions against trading based on material non-public information. Steve and James regularly monitor these and other elements of the firm's policies and procedures to assure compliance. For additional information, you may contact Truepoint at 513-792-6648.

SEC Form ADV Part 2B

Samuel A. Chasnoff (b. 1991), CFP®

Educational Background:

B.A. in International Studies, Miami University, 2016

Business Experience:

January 2024 – Present:

Wealth Advisor, Truepoint Wealth Counsel

August 2016 – December 2023:

Financial Planning Associate, Truepoint Wealth Counsel

Explanation of Professional Designations:

Certified Financial Planner (CFP®)

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”). To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: 1) complete an advanced college-level course of study addressing financial planning subject areas and attain a Bachelor’s Degree from a regionally accredited United States college or university; 2) pass the CFP® Certification Examination; 3) have at least three years of full-time financial planning-related experience; and 4) agree to be bound by CFP Board’s Standards of Professional Conduct, outlining the ethical and practice standards for CFP® professionals. Individuals must complete 30 hours of continuing education every two years, including two hours on the Code of Ethics, to maintain competence and keep up with developments in the field. Individuals must also renew an agreement to be bound by the Standard of Professional Conduct.

Disciplinary Information: None.

Other Business Activities: None.

Additional Compensation: None.

Supervision:

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SEC Form ADV Part 2B

Steven T. Condon (b. 1975), CFA

Educational Background:

B.A. in Business Administration, Thomas More College, 1997
M.B.A. in Investment Management, The Ohio State University, 2003

Business Experience:

April 2024 – Present:
CEO & Shareholder, Truepoint Wealth Counsel
July 2010 – March 2024:
President & Shareholder, Truepoint Wealth Counsel
January 2007 – July 2010:
Director & Principal, Truepoint Wealth Counsel
August 2003 – December 2006:
Director of Investment Advisory Services, Truepoint Wealth Counsel

Explanation of Professional Designations:

Chartered Financial Analyst (CFA)

The Chartered Financial Analyst charter is a globally-respected, graduate-level investment credential established in 1962 and awarded by CFA Institute — the largest global association of investment professionals. There are currently more than 90,000 holders of the CFA charter working in 134 countries. To earn the CFA charter, candidates must: 1) pass three sequential, six-hour examinations; 2) have at least four years of qualified professional investment experience; 3) join CFA Institute as members; and 4) commit to abide by, and annually reaffirm, their adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Disciplinary Information: None.

Other Business Activities:

Board of Trustees and Treasurer, Kenwood Country Club
Board and Executive Committee, Young Presidents' Organization Cincinnati

Additional Compensation: None.

Supervision:

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SEC Form ADV Part 2B

Scott M. Keller (b. 1976), CFA, CAIA

Educational Background:

B.S. in Business, Montana State University, 2003

Business Experience:

April 2024 – Present:

Chief Infrastructure Officer, Truepoint Wealth Counsel

January 2007 – March 2024:

Investment Specialist & Principal, Truepoint Wealth Counsel

January 2005 - January 2007:

Consultant, Greer Black Company

Explanation of Professional Designations:

Chartered Financial Analyst (CFA)

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Chartered Alternative Investment Analyst (CAIA)

The Chartered Financial Analyst charter is a The CAIA Program is designed to facilitate self-directed learning for today's busy professionals through a comprehensive set of readings on risk-return attributes of institutional quality alternative assets. Candidates' knowledge is assessed through exams, administered globally at computerized testing centers.

The program is organized into two levels of study; the Level I and Level II exams are offered twice each year, in March and September, giving candidates the opportunity to earn the CAIA Charter within a single year. CAIA candidates must pass both Level I and Level II of the CAIA exam to qualify for the CAIA Charter.

Once a qualified candidate completes the CAIA Program, he or she is eligible for CAIA membership.

Professional experience includes full-time employment in a professional capacity within the bank regulatory, banking, financial, or related fields. CAIA Charter Holders must have over one year of professional experience and a U.S. bachelor's degree (or equivalent) or four years of professional experience.

Disciplinary Information: None.

Other Business Activities:

Treasurer, Great Parks Foundation

Past-President, CFA Society Cincinnati

Additional Compensation: None.

Supervision:

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SEC Form ADV Part 2B

Ryan J. Klekar (b. 1977), CFP®, CTFA

Educational Background:

B.B.A. in Finance, Ohio University, 1999

Business Experience:

May 2011 - Present:

Wealth Advisor & Principal, Truepoint Wealth Counsel

January 2005 - April 2011:

Financial Advisor, Ken Byers and Associates

Explanation of Professional Designations:

Certified Financial Planner (CFP)

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Certified Trust and Financial Advisor (CTFA)

The CTFA designation is awarded by the American Bankers Association to those who apply for the designation and who meet the following requirements: (1) a minimum of three (3) years’ experience in wealth management, defined as direct experience in the various facets of delivering financial planning and fiduciary services relating to trusts, estates, IRAs and individual asset management accounts, and/or providing administrative, investment management, tax, legal and marketing services.; (2) completion of an ICB-approved wealth management training programs; (3) a professional reference evidencing ethical character; and (4) adherence to the ICB’s Professional Code of Ethics statement. The CTFA is maintained by ongoing adherence to ICB’s Professional Code of Ethics and completion of 45 credits of continuing education every three years.

Disciplinary Information: None.

Other Business Activities:

Board of Directors, Breakthrough T1D (formerly JDRF)
Mariemont Schools Athletic Boosters, Board Member

Additional Compensation: None.

Supervision:

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SEC Form ADV Part 2B

Christopher M. Meyer (b. 1967), CFA

Educational Background:

B.S. in Statistics and Economics, The University of Akron, 1989
M.B.A. in Finance, The Ohio State University, 1993

Business Experience:

June 2015 – Present:
Director of Institutional Investing & Shareholder, Truepoint Institutional Advisors
June 1993 - May 2015:
Managing Principal & Chief Investment Officer, Fund Evaluation Group, LLC
August 1989 - September 1991:
Trust Associate, Fifth Third Bank

Explanation of Professional Designations:

Chartered Financial Analyst (CFA)

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Disciplinary Information: None.

Other Business Activities:

Board of Directors and Treasurer, Lambda Chi Alpha Fraternity
Board of Directors and Chair, The Catholic Community Foundation of West Central and Southwest Ohio
Chair of Finance Council, St. Antoninus Church
Board of Trustees and Investment Committee Chair, Catholic Inner-City Schools Education (CISE) Foundation
Investment Advisory Committee, Glenmary Home Missioners
Investment Sub-Committee, Mount St. Joseph University
Investment Committee, Franciscan Monastery of the Holy Land in America
Investment Committee, Cincinnati Museum Center/Cincinnati Museums Foundation

Additional Compensation: None.

Supervision:

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SEC Form ADV Part 2B

Lauren M. Niestradt (b. 1985), CFA, CFP®

Educational Background:

B.S. in Business Administration, The Ohio State University, 2008

Business Experience:

January 2018 – Present:

Investment Specialist, Truepoint Wealth Counsel

2016 - 2018:

Wealth Advisor and Portfolio Manager, RiverPoint Capital Management

20014 - 2015:

Investment Advisor II, PNC Bank

2008 - 2013:

Portfolio Manager, Fifth Third

Explanation of Professional Designations:

Chartered Financial Analyst (CFA)

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Certified Financial Planner (CFP)

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Disciplinary Information: None.

Other Business Activities:

Board Member, Cincinnati Observatory Foundation

Investment Committee, St. Ursula Academy

Ambassador Council Member, Cincinnati Zoo and Botanical Garden

Additional Compensation: None.

Supervision:

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SEC Form ADV Part 2B

W. Ted Parchman (b. 1988), CFA

Educational Background:

B.S. in Finance, Miami University, 2010

Business Experience:

January 2025 – Present:

Director of Investments & Shareholder, Truepoint Wealth Counsel

January 2020 – December 2024:

Senior Portfolio Manager & Shareholder, Truepoint Wealth Counsel

April 2011 – December 2019:

Investment Specialist, Truepoint Wealth Counsel

June 2010 – March 2011:

Pricing Analyst, Progressive Insurance

Explanation of Professional Designations:

Chartered Financial Analyst (CFA)

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Disciplinary Information: None.

Other Business Activities:

Educational Chair, CFA Society of Cincinnati

Finance Committee Member, Glad House

Finance Committee, Boys and Girls Clubs of Greater Cincinnati

Investment Committee, Boys and Girls Clubs of Greater Cincinnati

Additional Compensation: None.

Supervision:

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