



## APCM WEALTH MANAGEMENT FOR INDIVIDUALS

March 2019

REGISTERED INVESTMENT ADVISER (RIA)

900 West 5th Avenue, Suite 601 Anchorage, AK 99501 [www.apcm.net](http://www.apcm.net)

This brochure supplement provides information about AWMI employees that supplements AWMI's brochure. You should have received a copy of the brochure. Please contact Evan Rose, AWMI CEO, if you did not receive AWMI's brochure or if you have any questions about the content of this supplement. Additional information about AWMI employees with a Series 65 license is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

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APCM WEALTH MANAGEMENT  
**FOR INDIVIDUALS**

Registered Investment Adviser



**LAURA BRUCE, CFP®, ChFC®**

**Director**

APCM Wealth Management for Individuals 2014–Present  
Alaska Permanent Capital Management 2007–Present  
First National Bank of Anchorage, Trust Officer/Portfolio Development 2002–2007  
Legacy Wealth Strategies, Owner/Consultant 2002–2007  
Wachovia Securities, Financial Advisor/Institutional Relationship Mgr. 1999–2003  
Bank of America, VP Private Bank Portfolio Mgr. 1994–1999  
b. 1969

University of Wisconsin-Whitewater, BBA  
CERTIFIED FINANCIAL PLANNER™, American College  
University for International Studies, Madrid Spain  
Chartered Financial Consultant, American College  
Series 65 License



**CATHIE STRAUB, CPA, CFP®**

**Director**

APCM Wealth Management for Individuals 2014–Present  
Alaska Permanent Capital Management 2009–2014  
Financial Resources, Inc. 1991–2009  
Ernst & Young, CPAs 1985–1991  
b. 1963  
Miami University, Oxford, OH, Cum Laude BS Business  
(Accounting & Finance)  
CERTIFIED FINANCIAL PLANNER™  
Certified Public Accountant  
Series 65 License



**MEGHAN A. CARSON**

**Associate Financial Advisor**

APCM Wealth Management for Individuals 2019 – Present  
Thomas, Head & Greisen, PC, Staff Accountant 2017-2018  
Senior Staff Accountant 2018-2019  
The Moose's Tooth, Bartender & Cashier, 2014-2016  
Alaska Permanent Capital Management, Intern, 2016  
Alaska Department of Revenue College Intern IV, 2015-2016  
UAA Department of Economics, Teaching & Research Assistant 2014-2015  
Kanady Chiropractic Center, Insurance Manager/Assistant Office Manager, 2007-2016  
b. 1991

University of Alaska Anchorage, BBA Accounting  
University of Alaska Anchorage, BA Economics



**JASMINE GILPIN**

**Associate Financial Advisor**

APCM Wealth Management for Individuals 2018-Present  
Alaska Permanent Capital Management, Intern Spring 2018  
Near Island Coffee, Manager 2012-2017  
b. 1992

University of Alaska Southeast, BBA Business  
Administration and Accounting



**MARIETTA HALL, CFP®**  
Financial Advisor

APCM Wealth Management for Individuals 2016–Present  
Lincoln Financial Advisors, Advisor 2007–2016  
Lincoln National Life, Advisor 1992–2007  
KMS Financial, Advisor 2004–2007  
Benefit Securities Inc., Advisor 1992–2004  
b. 1969

Washington State University, BA Finance  
University of Alaska, Anchorage  
CERTIFIED FINANCIAL PLANNER™ College for Financial Planning  
Series 65 License



**KIM BUTLER, CFP®**  
Financial Advisor

APCM Wealth Management for Individuals  
2014–Present  
MacroTrend Strategies, Financial Planning Assistant 2013–2014  
Charles Schwab & Co., Registered Representative 2011–2013  
b. 1989

University of Alaska Anchorage, BBA Finance  
Golden Gate University, MS Financial Planning  
CERTIFIED FINANCIAL PLANNER™



**CONNOR MICHAEL**  
Associate Financial Advisor

APCM Wealth Management for Individuals  
2018–Present  
Alyeska Ski Club Freeskiing Team, Program Director/Head Coach 2017–Present  
Naniq Global Logistics, Technical Specialist 2016–2018  
Alaska Mental Health Trust Authority, Trust Land Office, Intern 2015–2015  
Boslough Construction, Summers 2012–2014  
b. 1993

Western State Colorado University, BBA



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## More Information on the Designations

**Certified Public Accountant (CPA)** CPAs are licensed and regulated by state boards of accountancy. The education, experience and testing requirements for licensure as a CPA includes minimum college education of 150 credit hours with at least a baccalaureate degree and a concentration in accounting, at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of a CPA, and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, license holders must complete 80 hours of continuing professional education (CPE) over a two year period. Additionally, CPAs are required to follow a rigorous Code of Professional Conduct which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest, maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services.

**CERTIFIED FINANCIAL PLANNER™ (CFP®)** The CFP designation is administered by the Certified Financial Planner Board of Standards. Requirements include a Bachelor's Degree, the completion of an advanced college-level course of study addressing the area of financial planning (insurance, employee benefits, investments, income tax, retirement and estate planning), successful completion of a 10 hour exam, three years of experience, and agree to abide by the Standards of Professional Conduct. Designees must complete 30 hours of continuing education every two years. Certified Financial Planner Board of Standards Inc. owns the certification marks CFP® and CERTIFIED FINANCIAL PLANNER™ in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

**Chartered Financial Consultant® (ChFC®)** A Chartered Financial Consultant® has completed the most extensive educational program required for any financial services credential. Each ChFC® has taken eight or

more college-level courses on all aspect of financial planning from the American College, a non-profit educator with the highest level of academic accreditation. The average study time for the program is over 400 hours, plus a minimum of 30 hours of continuing education every two years, adhere to strict ethical standards, and must meet extensive experience requirements to ensure you get the professional financial advice you need. (small font last sentence if you did for above) The ChFC® is the property of The American College, which reserves sole rights to its use, and is used by permission.

**Series 65 license** This designation indicates completion of the Uniform Investment Adviser Law Examination, or the applicant holding a professional designation such as a CFA, ChFC, or CFP. The Series 65 license is designed to qualify candidates as investment adviser representatives.

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