

FORM ADV PART 2B BROCHURE SUPPLEMENT

David Eads, CFP®

Item 1 – Cover Page

David Eads
Vital Investment Management, LLC
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This brochure supplement provides information about David Eads that supplements the Vital Investment Management, LLC (“Vital Investment Management”) disclosure brochure. You should have received a copy of that brochure. Please contact David Eads at 970-776-3316 if you did not receive Vital Investment Management’s brochure or if you have any questions about the contents of this supplement.

Item 2 – Educational Background and Business Experience

David Eads

05/29/1983
CRD # 6058093

Post Secondary Educational Background:

Colorado State University, Construction Management: 2006

Business Background:

Vital Investment Management, Managing Member and Chief Compliance Officer, 02/2019 to Present;
Colorado Financial Management, Investment Advisor & Financial Planner, 04/2012 to 3/31/2019
Something Canadian LLC, Co-Owner, 05/2016 to Present
Engineered Outdoor Products LLC, Co-Owner, 08/2016 to 08/2019
US Engineering Company, Project Manager, 07/1998 to 04/2012

Professional Designations and Qualifications:

CERTIFIED FINANCIAL PLANNER™
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”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a

number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that the CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination administered in 10 hours over a two-day period includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2000 hours per year); and
- Ethics – Agree to be bound by the CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means the CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in the suspension or permanent revocation of their CFP® certification.

Item 3 – Disciplinary Information

David Eads has no legal or disciplinary events to report.

Item 4 – Other Business Activities

David Eads is not engaged in any other investment-related business activities.

Item 5 – Additional Compensation

David Eads may receive additional benefits. Certain product sponsors may provide David Eads with other economic benefits as a result of his recommendation or sale of the product sponsors' investments. The economic benefits received by David Eads from product sponsors can include but are not limited to, financial assistance or the sponsorship of conferences and educational sessions, marketing support, incentive awards, payment of travel expenses, and tools to assist David Eads in providing various services to clients.

Although Vital Investment Management and David Eads endeavor at all times to put the interest of its clients ahead of its own or those of its officers, directors, or representatives ("affiliated persons"), these arrangements could affect the judgment of David Eads when recommending investment products. These situations present a conflict of interest that may affect the judgment of affiliated persons including David Eads.

Item 6 – Supervision

David Eads is the Chief Compliance Officer of Vital Investment Management. He is responsible for overseeing and enforcing the firm's compliance programs that have been established to monitor and supervise the activities and services provided by the firm and its representatives. David Eads can be contacted at 970-776-3316.