



# Form ADV Part 2B Firm Brochure Supplement

April 1, 2025

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The purpose of this document is to provide prospective clients with biographical information on the individuals they may ultimately work with at Brighton Jones. Included in each biography is the educational background of each individual, current position within Brighton Jones, and detail concerning relevant certifications or designations held by the advisor.

If you have any questions or concerns, please contact our Chief Compliance Officer:

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**Timothy M. Amen**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Timothy M. Amen that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Timothy M. Amen is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

**ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Timothy M. Amen was born in 1972. Mr. Amen graduated from the University of Arizona in 1996 with a Bachelor of Science in Nutrition and a minor in Chemistry. He obtained a Master in Financial Planning in 2010 from the College of Financial Planning. Mr. Amen joined Brighton Jones as an Advisor in 2012 and has been a Lead Advisor since 2016. Prior to joining Brighton Jones, he worked at Charles Schwab as a Portfolio Consultant from 2006 to 2012.

Mr. Amen has been a **CERTIFIED FINANCIAL PLANNER™** since 2008. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Amen is a **Certified Estate Planner (CEP®)**. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Amen is also a **National Social Security Advisor (NSSA®)**. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

**ITEM 3 / DISCIPLINARY INFORMATION**

None.

**ITEM 4 / OTHER BUSINESS ACTIVITIES**

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**ITEM 5 / ADDITIONAL COMPENSATION**

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

**ITEM 6 / SUPERVISION**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**David L. Amiot**  
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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about David L. Amiot that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about David L. Amiot is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

David L. Amiot was born in 1990. Mr. Amiot graduated from Valdosta State University in 2012 with a Bachelor of Business Administration in Finance. Mr. Amiot joined Brighton Jones as Lead Advisor in 2022. Prior to joining Brighton Jones, he was a Financial Advisor (2020-2022) and a Registered Financial Assistant (2018-2020) at Summit Wealth Group. He also served as a Financial Representative at Fidelity Investments from 2013 to 2018.

Mr. Amiot has been a **CERTIFIED FINANCIAL PLANNER™** since 2017. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Amiot has held the designation of **Chartered Retirement Planning Counselor (CRPC®)** since 2017. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Amiot has passed the North American Securities Administrators Association (NASAA) Uniform Combined State Law Examination (**Series 66**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Madison K. Amsberry that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Madison K. Amsberry is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

**ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Madison K. Amsberry was born in 1993. Ms. Amsberry graduated from Azusa Pacific University with a Bachelor's degree in Marketing in 2015. Ms. Amsberry has been a Lead Advisor since 2021. Previously, she was an Advisor (2020), an Associate Advisor (2019), and a Client Service Associate (2016-2018). Prior to joining Brighton Jones, she was an Account Coordinator at FM Financial Services.

Ms. Amsberry has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Amsberry has been a **CERTIFIED FINANCIAL PLANNER™** since 2019. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

**ITEM 3 / DISCIPLINARY INFORMATION**

None.

**ITEM 4 / OTHER BUSINESS ACTIVITIES**

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**ITEM 5 / ADDITIONAL COMPENSATION**

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procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act (“Act”). The Registrant’s Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant’s policies and procedures and overseeing the activities of the Registrant’s supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant’s supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Melanie M. Arena**  
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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Melanie M. Arena that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Melanie M. Arena is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Melanie M. Arena was born in 1975. Ms. Arena graduated from Seattle University in 1997 with a Bachelor of Accountancy. Ms. Arena joined Brighton Jones as an Advisor in January of 2011 and became a Lead Advisor in 2019. Prior to joining Brighton Jones, she was a Relationship Manager at Threshold Group from 1999 to 2010.

Ms. Arena has been a **CERTIFIED FINANCIAL PLANNER™** since 2006. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

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**Noah F. Arrick**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Noah F. Arrick that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Noah F. Arrick is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Noah F. Arrick was born in 1999. Mr. Arrick graduated from University of Washington in 2022 with a Bachelor of Arts in Business Administration. Mr. Arrick joined Brighton Jones as an Associate Advisor in 2022.

Mr. Arrick has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

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## ITEM 5 / ADDITIONAL COMPENSATION

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**Bryce E. Baker**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Bryce E. Baker that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Bryce E. Baker is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Bryce E. Baker was born in 1990. Mr. Baker graduated Magna Cum Laude from The University of Arizona in 2012 where he earned a Bachelor of Science in Business Administration with a major in Finance. Mr. Baker has been a Lead Advisor with Brighton Jones since 2018. Previously, he an Advisor (2017) and an Associate Advisor (2012-2016).

Mr. Baker has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Baker has been a **CERTIFIED FINANCIAL PLANNER™** since 2016. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

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## ITEM 5 / ADDITIONAL COMPENSATION

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**Colleen Baker**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Colleen Baker that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Colleen Baker is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Colleen Baker was born in 1985. She graduated with a Bachelor's degree in Comparative History of Ideas at the University of Washington. Ms. Baker has been an Associate Advisor at Brighton Jones since 2023. Prior to joining Brighton Jones, she was a General Manager at Delancy & Essex.

Ms. Baker has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Michael J. Battaglia**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Michael J. Battaglia that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Michael J. Battaglia is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael J. Battaglia was born in 1972. Mr. Battaglia graduated from the University of Maryland with a Bachelor of Arts degree in Economics. Mr. Battaglia joined Brighton Jones in 2011 as a Lead Advisor and became a Senior Lead Advisor in 2020. Prior to joining Brighton Jones, he was a Personal Financial Manager at Pitcairn from 2007 to 2011. Mr. Battaglia's previous roles also include his role as a Manager in PricewaterhouseCoopers' Personal Financial Services Group as well as a Financial Advisor at Medallion Financial Group.

Mr. Battaglia has been a **CERTIFIED FINANCIAL PLANNER™** since 2005. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

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**Corinne D. Salera Bedford**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Corinne D. Salera that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Corinne D. Salera is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Corinne D. Salera was born in 1985. Ms. Salera graduated in 2007 from University of California, Santa Barbara with a Bachelor of Science in Financial Mathematics and Statistics. Ms. Salera joined Brighton Jones in 2019 as an Advisor and has been a Lead Advisor since 2021. Prior to that, she held positions at Bell Investment Advisors as a Portfolio Manager and Investment Advisor from 2016-2019 and as a Relationship Manager from 2012-2015.

Ms. Salera has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Salera has been a **CERTIFIED FINANCIAL PLANNER™** since 2017. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

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**Mary Bierds**  
**Brighton Jones, LLC**

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Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Mary Bierds that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Mary Bierds is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Mary Bierds was born in 1983. She graduated with a Bachelor's degree in Business Management at Texas A&M University and a Master's Degree of Trust and Wealth Management at Campbell University. Ms. Bierds joined Brighton Jones as an Associate Advisor since 2024. Prior to joining Brighton Jones, she was a Trust Administrative Officer at Tolleson Wealth Management (2022-2024) and a Wealth Associate Relationship Manager at BB&T (2013-2015).

Ms. Bierds has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the

activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Samuel D. Blank**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Samuel D. Blank that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Samuel D. Blank is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Samuel D. Blank was born in 1998. Mr. Blank graduated in 2021 from Washington State University with a Bachelor of Arts in Business Administration. Mr. Blank joined Brighton Jones as an Associate Advisor in 2021. Prior to joining Brighton Jones, he was a Financial Consultant Intern at Slate Group Consulting (2020) and a Financial Advisor Intern at Cetera Investors (2020).

Mr. Blank has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Blank has been a **CERTIFIED FINANCIAL PLANNER™** since 2024. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Christian M. Blazona**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
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(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Christian M. Blazona that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Christian M. Blazona is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Christian Blazona was born in 2000. Mr. Blazona graduated from University of Washington in 2022 with a Bachelor of Arts in Business Administration, Finance. Mr. Blazona joined Brighton Jones as an Associate Advisor in 2022.

Mr. Blazona has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

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#### ITEM 6 / SUPERVISION

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of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Alena N. Boucek**  
**Brighton Jones, LLC**

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Scottsdale, AZ 85251  
(480) 353-2456

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Alena N. Boucek that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Alena N. Boucek is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Alena N. Boucek was born in 1999. She graduated with a Bachelor's degree in Business Administration from Chapman University. Ms. Boucek has been an Associate Advisor at Brighton Jones since 2021. Prior to joining Brighton Jones, she was a Processing Assistant at VIP Mortgage Inc. from 2020 – 2021 and a Marketing Intern at Voting Smarter in 2020.

Ms. Boucek has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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## ITEM 6 / SUPERVISION

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activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Ryan Bridge**  
**Brighton Jones, LLC**

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(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Ryan Bridge that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Ryan Bridge is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Ryan Bridge was born in 2002. He graduated with a Bachelor's degree in Business Finance and Economics at Chapman University. Mr. Bridge joined Brighton Jones as an Associate Advisor in 2024.

Mr. Bridge has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Charles E. Brighton**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Charles E. Brighton that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Charles E. Brighton is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Charles E. Brighton was born in 1967. Mr. Brighton graduated from the University of New Mexico with a Bachelor of Arts degree in Economics. He is a Founding Member of Brighton Jones and served as Co-CEO from 2000 - 2020. Charles has served as the Managing Director and Senior Lead Advisor of Brighton Jones' Family Office Group since 2021.

Mr. Brighton has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

Mr. Brighton is a board member of Blueprint Capital REIT. Blueprint Capital REIT is managed by Blueprint Capital Services which is located at 4147 California Avenue SW, Seattle, WA 98116.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

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**Daniel Browne**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Daniel Browne that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Daniel Browne is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Daniel Browne was born in 1987. Mr. Browne graduated with a Bachelor of Science degree in Business Administration and Management from Belhaven University in 2009. He joined Brighton Jones in 2024 as a Lead Advisor.

Mr. Browne has been a **CERTIFIED FINANCIAL PLANNER™** since 2024. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Brian S. Burgess**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Brian S. Burgess that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Brian S. Burgess is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Brian S. Burgess was born in 1991. Mr. Burgess graduated with a Bachelor of Business Administration: Finance & Marketing from Gonzaga University in 2013. He joined Brighton Jones in 2017 as an Associate Advisor; became an Advisor in 2020; and has been a Lead Advisor since 2021. Prior to joining Brighton Jones, Mr. Burgess was a Client Service Associate at Laird Norton Wealth Management.

Mr. Burgess has been a **CERTIFIED FINANCIAL PLANNER™** since 2018. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Katherine E. Burgess**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Katherine E. Kester that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Katherine E. Kester is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Katherine E. Kester was born in 1994. Ms. Kester graduated from University of Rochester with a Master in Finance in 2017 and graduated from Stony Brook University in 2016 with a Bachelor of Science in Health Science. Ms. Kester joined Brighton Jones as a Client Service Associate in 2017. She became an Associate Advisor in 2019; an Advisor in 2021; and a Lead Advisor in 2022.

Ms. Kester has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65** Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Kester has been a **CERTIFIED FINANCIAL PLANNER™** since 2021. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Matthew A. Camrud**  
**Brighton Jones, LLC**

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Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Matthew A. Camrud that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Matthew A. Camrud is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Matthew A. Camrud was born in 1979. Mr. Camrud graduated from St. Olaf College with a Bachelor of Arts degree in Economics and Management. Mr. Camrud joined Brighton Jones in 2008 as an Advisor, became a Lead Advisor in 2011 and became a Senior Lead Advisor in 2020. Prior to joining Brighton Jones, he was a Senior Planner at Carlson Capital Management from 2001 to 2008.

Mr. Camrud has been a **CERTIFIED FINANCIAL PLANNER™** since 2004. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Alexia R. Candelaria**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Alexia R. Candelaria that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Alexia R. Candelaria is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Alexia R. Candelaria was born in 1989. Ms. Candelaria graduated from the University of Arizona in 2012 with a Bachelor of Science in Business Administration with a major in Finance. Ms. Candelaria joined Brighton Jones as an Advisor in 2017 and has been a Lead Advisor since 2021. Prior to joining Brighton Jones, Ms. Candelaria was at Northwestern Mutual as an Associate Wealth Management Advisor from 2012 to 2017.

Ms. Candelaria has been a **CERTIFIED FINANCIAL PLANNER™** since 2014. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Candelaria has also held the designation of **Chartered Life Underwriter (CLU®)** since 2014. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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## Alexander Cannella

### Brighton Jones, LLC

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Scottsdale, AZ 85251  
(480) 353-2456

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Alexander Cannella that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Alexander Cannella is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Alexander Cannella was born in 2001. He graduated with a Bachelor's degree in Business Economics at University of Arizona. Mr. Cannella has been an Associate Advisor at Brighton Jones since 2023.

Mr. Cannella has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

#### ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules

thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Brett H. Carolan**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Brett H. Carolan that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Brett H. Carolan is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

**ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Brett H. Carolan was born in 1971. Mr. Carolan graduated from Washington State University with a Bachelor of Arts degree in Sports Management (College of Education). Mr. Carolan has been a Lead Advisor at Brighton Jones since April 2003 and became a Senior Lead Advisor in 2020.

Mr. Carolan has been a **CERTIFIED FINANCIAL PLANNER™** since 2003. *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

**ITEM 3 / DISCIPLINARY INFORMATION**

None.

**ITEM 4 / OTHER BUSINESS ACTIVITIES**

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**ITEM 5 / ADDITIONAL COMPENSATION**

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

**ITEM 6 / SUPERVISION**

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those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Sue F. Cheung**  
**Brighton Jones, LLC**

445 Bush Street, 6<sup>th</sup> Floor,  
San Francisco, CA 94108  
(415) 673-3632

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Sue F. Cheung that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Sue F. Cheung is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Sue F. Cheung was born in 1979. Ms. Cheung graduated from University of South Florida with a Master of Business Administration (MBA). She has been a Lead Advisor at Brighton Jones since 2023. Prior to joining Brighton Jones, Ms. Cheung was an Assistant Vice President and Branch Manager at Morgan Stanley from 2021-2022, Chief of Investor Relations at Lighthaven Capital Management from 2020-2021, Financial Adviser at Independent Financial Group from 2019-2020, and VP, Financial Consultant at Charles Schwab from 2015-2018.

Ms. Cheung has been a **CERTIFIED FINANCIAL PLANNER™** since 2017. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

#### ITEM 6 / SUPERVISION

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**Dennis S. Chiu**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
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(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Dennis S. Chiu that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Dennis S. Chiu is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Dennis S. Chiu was born in 1993. Mr. Chiu graduated from South Seattle College with a Bachelor of Applied Science in Hospitality Management in 2019. He joined Brighton Jones as an Associate Advisor in 2021. Prior to joining Brighton Jones, Dennis was a Legal Assistant at Weinstein & Riley, P.S. (2019-2021). Prior roles also include Production Baker at Storyville (2018-2019); Lead Cook at Crista Camps – Island Lake (2017-2018).

Mr. Chiu has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Chiu has been a **CERTIFIED FINANCIAL PLANNER™** since 2024. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Peter Chown**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Peter Chown that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Peter Chown is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Peter Chown was born in 1980. Mr. Chown graduated from Gonzaga University in 2003. He joined Brighton Jones as an Advisor in 2024. Prior to joining Brighton Jones, Mr. Chown was a Financial Planner at Tallus Capital Management.

Mr. Chown has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Chown has been a **CERTIFIED FINANCIAL PLANNER™** since 2023. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Clint M. Christensen**  
**Brighton Jones, LLC**

445 Bush Street, 6<sup>th</sup> Floor,  
San Francisco, CA 94108  
(415) 653-3632

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Clint M. Christensen that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Clint M. Christensen is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Clint M. Christensen was born in 1979. Mr. Christensen graduated from Westminster College with a Bachelor of Science degree in Business Finance. Mr. Christensen also earned his Master of Business Administration degree in Global Strategic Management from Dominican University of California. He has been a Lead Advisor at Brighton Jones since 2007 and became a Senior Lead Advisor in 2020. Prior to joining Brighton Jones, he was Vice President and Senior Account Executive with Fidelity Investments from 1999 to 2007.

Mr. Christensen has been a **CERTIFIED FINANCIAL PLANNER™** since 2004. *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Madison Clark**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Madison Clark that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Madison Clark is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Madison Clark was born in 2001. Ms. Clark graduated from University of Washington with a Bachelor's degree in Finance in 2023. She joined Brighton Jones as an Associate Advisor in 2023 and previously served as a Wealth Management Intern at Brighton Jones in 2022.

Ms. Clark has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**John S. (Shelby) Clements**  
**Brighton Jones, LLC**

301 Congress Ave, 12th Floor,  
Austin, TX 78701  
(737) 241-1255

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about John S. Clements that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about John S. Clements is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

John S. Clements was born in 1990. Mr. Clements graduated from the University of Kentucky with a Bachelor's degree in Accounting and Finance. He has been an Advisor at Brighton Jones since 2023. Prior to joining Brighton Jones, Mr. Clements was an Advisor at Durbin Bennett from 2019 – 2023 and a Business Valuation Consultant at Dean Dorton Allen Ford, PLLC from 2017-2019.

Mr. Clements has been a **CERTIFIED FINANCIAL PLANNER™** since 2017. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

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**J M. Crosby**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about J M. Crosby that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about J M. Crosby is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

J Crosby was born in 1996. Mr. Crosby graduated in 2018 from Pacific Lutheran with a Bachelor of Arts in Business Administration with an emphasis in Finance. Mr. Crosby joined the Associate Training Program at Brighton Jones in 2018. He also served as an Investment Analyst (2019-2021) and Investment Associate (2021-2022) and has been Investment Operations Manager since 2023. Prior to joining Brighton Jones, he held intern positions at Pacific Capital Resource Group and Madison Park Advisors.

Mr. Crosby has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**John T. Curle**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about John T. Curle that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about John T. Curle is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

John T. Curle was born in 1990. Mr. Curle graduated in 2012 with a Bachelor of Arts in History from St. Lawrence University. Mr. Curle joined Brighton Jones in 2017 as an Advisor and has been a Lead Advisor since 2021. Prior to joining Brighton Jones, he was a Premier Banker at Wells Fargo from 2014 to 2017.

Mr. Curle has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Curle has been a **CERTIFIED FINANCIAL PLANNER™** since 2021. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Michael F. Curtis**  
**Brighton Jones, LLC**

8150 N. Central Expressway Suite 875,  
Dallas, TX 75206  
(469) 722-1526

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Michael F. Curtis that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Michael F. Curtis is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael Curtis was born in 1990. Mr. Curtis graduated from Abilene Christian University with a Bachelor of Business Administration in Marketing in 2014. Mr. Curtis has been a Lead Advisor at Brighton Jones since 2021. Prior to joining Brighton Jones, Mr. Curtis was a Senior Analyst at Tolleson Wealth Management (2016 – 2020). He also worked at Fidelity as a High Net Worth Case Manager (2015 – 2016) and as a High Net Worth Representative (2014 – 2015).

Mr. Curtis has been a **CERTIFIED FINANCIAL PLANNER™** since 2017. *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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## ITEM 6 / SUPERVISION

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## Hinnah Daryani Brighton Jones, LLC

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Hinnah Daryani that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Hinnah Daryani is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Hinnah Daryani was born in 1998. Ms. Daryani graduated with a Bachelor's in Business at the University of California, Riverside. Ms. Daryani joined Brighton Jones as an Associate Advisor in 2024. Prior to joining Brighton Jones, she was a Certified Financial Planner at Vanguard (2017-2024).

Ms. Daryani has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Daryani has been a **CERTIFIED FINANCIAL PLANNER™** since 2024. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

### ITEM 3 / DISCIPLINARY INFORMATION

None.

### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

### ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily

responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Gavin Dayment**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Gavin Dayment that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Gavin Dayment is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Gavin Dayment was born in 1999. He graduated with a Bachelor's degree in Financial Management at California Polytechnic State University-San Luis Obispo. Mr. Dayment has been an Associate Advisor at Brighton Jones since 2024.

Mr. Dayment has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Jonathan D. de Smidt**  
**Brighton Jones, LLC**

1300 El Camino Real, Suite 100  
Menlo Park, CA 94025  
(650) 618-3400

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Jonathan D. de Smidt that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jonathan D. de Smidt is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

**ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Jonathan D. de Smidt was born in 1993. He graduated from California Polytechnic State University San Luis Obispo in 2016 with a Bachelor of Science in Business Administration and in 2017 with a Master of Science in Financial Accounting. Mr. de Smidt joined Brighton Jones as an Associate Advisor in 2021 and has been an Advisor since 2023. Prior to joining Brighton Jones, Jonathan was a Senior Financial Accountant at InfoTrack US, Inc. (2021); a Senior Accountant at Dynamic Signal, Inc. (2019-2021); and an Assurance Senior at Ernst & Young LLP (2017-2019).

Mr. de Smidt has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. de Smidt has been a **CERTIFIED FINANCIAL PLANNER™** since 2022. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. de Smidt is also a **CERTIFIED PUBLIC ACCOUNTANT (CPA)** in the State of California. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

**ITEM 3 / DISCIPLINARY INFORMATION**

None.

**ITEM 4 / OTHER BUSINESS ACTIVITIES**

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**ITEM 5 / ADDITIONAL COMPENSATION**

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective

clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

#### ITEM 6 / SUPERVISION

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**Connor B. Donnelly**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Connor B. Donnelly that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Connor B. Donnelly is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Connor Donnelly was born in 1993. He graduated from University of Washington Bothell in 2022 with a Bachelor of Arts degree in Business Administration, Finance. Mr. Donnelly joined Brighton Jones as an Associate Advisor in 2022. Prior to joining Brighton Jones, he was a Client Service Representative at Merchants Credit Association in 2019.

Mr. Donnelly has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

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of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Barret W. Dowling**  
**Brighton Jones, LLC**

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San Francisco, CA 94108  
(415) 673-3632

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Barret W. Dowling that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Barret W. Dowling is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

**ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Barret W. Dowling was born in 1996. Mr. Dowling graduated from Oregon State University in 2019 with a Bachelor of Science degree in Finance. He joined Brighton Jones as an Associate Advisor in 2022. Prior to joining Brighton Jones, Mr. Dowling was an Investment Analyst at RVK Inc. (2019-2021).

Mr. Dowling has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

**ITEM 3 / DISCIPLINARY INFORMATION**

None.

**ITEM 4 / OTHER BUSINESS ACTIVITIES**

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**ITEM 5 / ADDITIONAL COMPENSATION**

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**ITEM 6 / SUPERVISION**

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of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

## Haley Droppelman Brighton Jones, LLC

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Haley Droppelman that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Haley Droppelman is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Haley Droppelman was born in 2001. Ms. Droppelman graduated with a Bachelor's degree in Business Administration from Central Washington University in 2024. She joined Brighton Jones as an Associate Advisor in 2024.

Ms. Droppelman has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

### ITEM 3 / DISCIPLINARY INFORMATION

None.

### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### ITEM 5 / ADDITIONAL COMPENSATION

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

## Morgan Everett Brighton Jones, LLC

1676 International Drive, Suite 640,  
McLean, VA 22102  
(703) 682-1470

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Morgan Everett that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Morgan Everett is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Morgan Everett was born in 2001. She graduated with a Bachelor's degree in Finance at Howard University. Ms. Dowell has been an Associate Advisor at Brighton Jones since 2024.

Ms. Everett has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Facini has been a **CERTIFIED FINANCIAL PLANNER™** since 2024. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

### ITEM 3 / DISCIPLINARY INFORMATION

None.

### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### ITEM 5 / ADDITIONAL COMPENSATION

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**Jennifer M. Facini**  
**Brighton Jones, LLC**

615 Channelside Drive, Suite 207  
Tampa, FL 33602  
(813) 723-8635

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Jennifer M. Facini that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jennifer M. Facini is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jennifer M. Facini was born in 1986. Ms. Facini earned her Bachelor degree in Finance from the University of Florida in 2009 and her Master of Business Administration also the University of Florida in 2013. Ms. Facini joined Brighton Jones as a Lead Advisor in 2021. Prior to joining Brighton Jones, she was a Portfolio Manager/Lead Advisor at ARS Wealth Advisors.

Ms. Facini has been a **CERTIFIED FINANCIAL PLANNER™** since 2014. *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

Ms. Facini also works as an Adjunct Finance Professor at Southern New Hampshire University.

#### ITEM 5 / ADDITIONAL COMPENSATION

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**Mark J. Frenzel-Sulyok**  
**Brighton Jones, LLC**

1676 International Drive, Suite 640,  
McLean, VA 22102  
(703) 682-1470

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Mark J. Frenzel-Sulyok that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Mark J. Frenzel-Sulyok is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

**ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Mark J. Frenzel-Sulyok was born in 1997. Mr. Frenzel-Sulyok graduated in 2020 from Dickinson College with a Bachelor of Arts in International Business and Management. He joined Brighton Jones as an Associate Advisor in 2021. Prior to joining Brighton Jones, Mr. Frenzel-Sulyok was a Financial Advisor at McAdam Financial (2020 – 2021).

Mr. Frenzel-Sulyok has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

**ITEM 3 / DISCIPLINARY INFORMATION**

None.

**ITEM 4 / OTHER BUSINESS ACTIVITIES**

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**ITEM 5 / ADDITIONAL COMPENSATION**

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**Nicholas N. Gearhart**  
**Brighton Jones, LLC**

4211 N. Marshall Way, Suite 100  
Scottsdale, AZ 85251  
(480) 353-2456

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Nicholas N. Gearhart that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Nicholas N. Gearhart is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Nicholas (Nick) Gearhart was born in 1994. Mr. Gearhart graduated in 2017 with a Bachelor of Science in Finance from St. Cloud State University. Mr. Gearhart joined Brighton Jones as an Advisor in 2022 and became a Lead Advisor in 2023. Previously, Mr. Gearhart was a Wealth Advisor at CLA Wealth Advisors, LLC from 2017-2022.

Mr. Gearhart has been a **CERTIFIED FINANCIAL PLANNER™** since 2019. *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

Mr. Gearhart has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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## Madison S. Glass

### Brighton Jones, LLC

1676 International Drive, Suite 640,  
McLean, VA 22102  
(703) 682-1470

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Madison S. Glass that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Madison S. Glass is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Madison S. Glass was born in 1994. Ms. Glass graduated from Dickinson College in 2018 with a Bachelor of Arts degree in International Business. Ms. Glass joined Brighton Jones in 2018 as a Client Service Associate, became an Associate Advisor in 2020, then a Growth & Operations Manager in 2023; and has been an Advisor since 2023. Prior to joining Brighton Jones, Ms. Glass held intern positions at Charles Schwab and Round Rock Advisors.

Ms. Glass has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Glass has been a **CERTIFIED FINANCIAL PLANNER™** since 2022. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

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**Jordan R. Graham**  
**Brighton Jones, LLC**

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Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Jordan R. Graham that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jordan R. Graham is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jordan R. Graham was born in 1997. Mr. Graham graduated from University of Washington in 2020 where he earned a Bachelor of Arts degree in Business Administration. Mr. Graham joined Brighton Jones as an Associate Advisor in 2020 and has been an Advisor since 2022.

Mr. Graham has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Graham as been a **CERTIFIED FINANCIAL PLANNER™** since 2022. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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## ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily

responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

## Shenyan (Nicole) Gu Brighton Jones, LLC

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Nicole Gu that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Nicole Gu is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Nicole Gu was born in 1992. Ms. Gu graduated from Simon Fraser University in 2016 with a Master of Science in Finance; and she graduated from DongHua University in 2014 with a Bachelor of Engineering. Ms. Gu joined Brighton Jones in 2022 as an Advisor. Prior to joining Brighton Jones, Ms. Gu was a Financial Advisor (2020-2022) and an Advisory Associate (2018-2020) at BlueShore Financial. She also served as a Senior Financial Services Representative (2016-2018) at Canadian Imperial Bank of Commerce.

Ms. Gu has been a **CERTIFIED FINANCIAL PLANNER™** since 2022 in the U.S. (since 2021 in Canada). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

### ITEM 3 / DISCIPLINARY INFORMATION

None.

### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

### ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily

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**Steven M. Hanks**  
**Brighton Jones, LLC**

8150 N. Central Expressway Suite 875,  
Dallas, TX 75206  
(469) 722-1526

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Steven M. Hanks that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Steven M. Hanks is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Steven M. Hanks was born in 1990. Mr. Hanks graduated from the University of Washington in 2012 with a Bachelor of Arts in Business Administration with a concentration in Finance. Mr. Hanks joined Brighton Jones as an Associate Advisor in 2012; became an Advisor in 2017; and has been a Lead Advisor since 2018.

Mr. Hanks has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Hanks has been a **CERTIFIED FINANCIAL PLANNER™** since 2018. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and

procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act (“Act”). The Registrant’s Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant’s policies and procedures and overseeing the activities of the Registrant’s supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant’s supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Karen M. Harris**  
**Brighton Jones, LLC**

1624 NW Lovejoy Street  
Portland, OR 97209  
(503) 594-7400

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Karen M. Harris that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Karen M. Harris is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Karen M. Harris was born in 1983. Ms. Harris graduated from Seattle Pacific University with a Bachelor of Arts degree in Mathematics and a Secondary Teaching Certification. Ms. Harris joined Brighton Jones in 2017 as a Lead Advisor. Prior to joining Brighton Jones, she was a Financial Planner from 2012-2017 at FIC Capital, Inc. In 2017, Ms. Harris transitioned to her role as Director of Financial Planning & Wealth Manager when FIC Capital merged with Alexandria Capital.

Ms. Harris has been a **CERTIFIED FINANCIAL PLANNER™** since 2013. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Harris has held the designation of **Chartered Retirement Planning Counselor (CRPC®)** since 2010. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and

procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act (“Act”). The Registrant’s Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant’s policies and procedures and overseeing the activities of the Registrant’s supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant’s supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Jackson Hartz**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Jackson Hartz that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jackson Hartz is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jackson Hartz was born in 2001. Mr. Hartz graduated with a Bachelor's degree in Economics from UCLA in 2024. Mr. Hartz joined Brighton Jones as an Associate Advisor in 2024.

Mr. Hartz has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address

those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000

**Tyler D. Harvey**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Tyler D. Harvey that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Tyler D. Harvey is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Tyler D. Harvey was born in 1986. Mr. Harvey graduated from Olivet Nazarene University with a Bachelor of Arts in Political Science in 2008 and earned his Master of Organizational Leadership in 2011 from Olivet Nazarene University. Mr. Harvey has been a Lead Advisor at Brighton Jones since 2022. Previously, Mr. Harvey served clients at Brighton Jones as an Advisor (2021); an Associate Advisor (2019-2020); and a Client Service Associate (2016-2018). Prior to joining Brighton Jones, Mr. Harvey was an Associate at Oppenheimer Funds from 2013 to 2016.

Mr. Harvey has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Harvey has been a **CERTIFIED FINANCIAL PLANNER™** since 2021. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

**ITEM 6 / SUPERVISION**

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**Kiley Hein**  
**Brighton Jones, LLC**

4211 N. Marshall Way, Suite 100  
Scottsdale, AZ 85251  
(480) 353-2456

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Kiley Hein that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Kiley Hein is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kiley Hein was born in 2002. She graduated with a Bachelor's degree in Business Finance at Washington State University. Ms. Hein joined Brighton Jones as an Associate Advisor in 2024.

Ms. Hein has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Tania Hillin**  
**Brighton Jones, LLC**

445 Bush Street, 6<sup>th</sup> Floor,  
San Francisco, CA 94108  
(415) 673-3632

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Tania Hillin that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Tania Hillin is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Tania Hillin was born in 1987. Mrs. Hillin graduated from University of Texas at Arlington with a Bachelor's degree in Biology. She has been a Manager at Brighton Jones since 2023. Prior to Brighton Jones she was a Support Advisor and Paraplanner at Eissner Financial from 2022-2023, and a Loan Specialist, Client Relations Manager, and Client Service Associate at First Republic Bank from 2017-2022.

Mrs. Hillin has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

Mrs. Hillin has been a **CERTIFIED FINANCIAL PLANNER™** since 2023. *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Eric Ho**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Eric Ho that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Eric Ho is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Eric Ho was born in 1996. Mr. Ho graduated from Creighton University in 2018 with a Bachelor of Science in Biology, minor in Business Administration. Mr. Ho joined Brighton Jones in 2022 as an Associate Advisor. Prior to joining Brighton Jones, Mr. Ho was a Corporate Actions Specialist (2020-2022) at Axos Clearing, LLC; a Client Service Representative (2020) at TD Ameritrade; and an Account Manager (2018-2019) at THRYV.

Mr. Ho has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Christopher C. Hoffa**  
**Brighton Jones, LLC**

1676 International Drive, Suite 640,  
McLean, VA 22102  
(703) 682-1470

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Christopher C. Hoffa that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Christopher C. Hoffa is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Christopher C. Hoffa was born in 1996. Mr. Hoffa graduated from University of Virginia with a Bachelor of Science in Commerce in 2018. Mr. Hoffa joined Brighton Jones as an Associate Advisor in 2020 and has been an Advisor since 2022.

Mr. Hoffa has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Hoffa has been a **CERTIFIED FINANCIAL PLANNER™** since 2022. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Hoffa is also a **CERTIFIED PUBLIC ACCOUNTANT (CPA)** in the State of Virginia. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Brennan Holmes**  
**Brighton Jones, LLC**

4211 N. Marshall Way, Suite 100  
Scottsdale, AZ 85251  
(480) 353-2456

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Alexander Cannella that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Alexander Cannella is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

**ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Brennan Holmes was born in 1999. He graduated with a Bachelor's degree in Business Economics at University of Arizona. Mr. Holmes joined Brighton Jones as an Associate Advisor in 2023.

Mr. Holmes has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

**ITEM 3 / DISCIPLINARY INFORMATION**

None.

**ITEM 4 / OTHER BUSINESS ACTIVITIES**

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**ITEM 5 / ADDITIONAL COMPENSATION**

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

**ITEM 6 / SUPERVISION**

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those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Matthew Howell**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Matthew Howell that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Matthew Howell is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

**ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Matthew Howell was born in 1986. Mr. Howell graduated with a Bachelor of Arts degree in Finance from Washington State University in 2010. Mr. Howell joined Brighton Jones as an Associate Advisor in 2015, became an Investment Strategist in 2018, and became Director of Portfolio Strategy in 2024.

Mr. Howell has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Howell has passed the North American Securities Administrators Association (NASAA) Uniform Combined State Law Examination (**Series 66**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

**ITEM 3 / DISCIPLINARY INFORMATION**

None.

**ITEM 4 / OTHER BUSINESS ACTIVITIES**

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**ITEM 5 / ADDITIONAL COMPENSATION**

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

**ITEM 6 / SUPERVISION**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and

procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act (“Act”). The Registrant’s Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant’s policies and procedures and overseeing the activities of the Registrant’s supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant’s supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Wenqi Huang**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Wenqi Huang that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Wenqi Huang is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Wenqi Huang was born in 1997. Ms. Huang received her Bachelor of Arts in Economics from University of Washington in 2020. She joined the Associate Training Program in 2019 and became an Advisor in 2020. Prior to joining Brighton Jones, she was a Fiscal Intern at UW Medical Center.

Ms. Huang has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Huang has been a **CERTIFIED FINANCIAL PLANNER™** since 2021. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

#### ITEM 6 / SUPERVISION

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**Anallely Valdez-Johnson**  
**Brighton Jones, LLC**

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(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Anallely De Los Santos that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Anallely De Los Santos is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Anallely De Los Santos was born in 1994. Ms. De Los Santos graduated from University of Washington with a Bachelor's degree in Anthropology. She joined Brighton Jones as an Associate Advisor since 2022. Prior to joining Brighton Jones, she was a College Bound Regional Officer from 2020-2022 and a School-Based Advisor from 2017-2020 at the College Success Foundation.

Ms. De Los Santos has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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## ITEM 6 / SUPERVISION

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**Jacob D. Jones**  
**Brighton Jones, LLC**

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 Seattle, WA 98121  
 (206) 258-5000

BROCHURE SUPPLEMENT  
 DATED 4/1/2025

This Brochure Supplement provides information about Jacob D. Jones that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jacob D. Jones is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jacob Jones was born in 1998. He graduated from University of Mississippi in 2021 with a Bachelor's degree in Business Administration. Mr. Jones joined Brighton Jones as an Associate Advisor in 2021.

Mr. Jones has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Jones has been a **CERTIFIED FINANCIAL PLANNER**<sup>™</sup> since 2023. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Jon D. Jones**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Jon D. Jones that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jon D. Jones is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jon Jones was born in 1971 and holds a Bachelor of Arts in Business Administration degree from Washington State University. Mr. Jones is a Founding Member of Brighton Jones and has served as CEO since 2000.

Mr. Jones has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

Mr. Jones serves as a board member and is a minority owner in RMB Capital Management, LLC, a registered investment adviser located in Chicago, IL.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Matthew W. Kelley**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Matthew W. Kelley that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Matthew W. Kelley is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Matthew W. Kelley was born in 1996. Mr. Kelley graduated from Louisiana State University with a Bachelor's degree in Finance. He joined Brighton Jones as a Manager in 2023 and has been an Advisor since 2023. Prior to joining Brighton Jones, Mr. Kelley was a Financial Advisor Trainee at Edward Jones from 2018-2020, a Wealth Advisor Associate at Morgan Stanley from 2019-2021, and an Associate Advisor at Merriman Wealth Management from 2021-2022.

Mr. Kelley has been a **CERTIFIED FINANCIAL PLANNER™** since 2022. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

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of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Tyler Kim**  
**Brighton Jones, LLC**

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Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Tyler Kim that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Tyler Kim is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Tyler Kim was born in 2000. Mr. Kim graduated with a Bachelor's in Finance at Central Washington University. Mr. Kim joined Brighton Jones as an Associate Advisor in 2024.

Mr. Kim has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Laura L. Kimball**  
**Brighton Jones, LLC**

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Dallas, TX 75206  
(469) 722-1526

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Laura L. Kimball that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Laura L. Kimball is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Laura L. Kimball was born in 1964. Ms. Kimball graduated from Southern Methodist University with a Master of Business Administration in 1997 and graduated from Arizona State University in 1988 with a Bachelor of Science in Accounting. Ms. Kimball joined Brighton Jones as Lead Advisor in 2022. Prior to joining Brighton Jones, she was a Financial Planner at Facet Wealth (2021-2022), a Financial Advisor at Aspire Planning Associates (2019-2021); a Relationship Manager at United Capital (2017-2018) and a Sr. Director, Project Management at Capital One (2010-2017).

Ms. Kimball has been a **CERTIFIED FINANCIAL PLANNER™** since 2020. *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

Ms. Kimball is also a **CERTIFIED PUBLIC ACCOUNTANT (CPA)** in the State of Texas. *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

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**Rachel A. Kuhnert**  
**Brighton Jones, LLC**

1624 NW Lovejoy Street  
Portland, OR 97209  
(503) 594-7400

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Rachel A. Kuhnert that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Rachel A. Kuhnert is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Rachel A. Kuhnert was born in 1998. Ms. Kuhnert graduated from University of California, Los Angeles with a Bachelor of Arts, Economics in 2021. Ms. Kuhnert joined Brighton Jones as Senior Analyst in 2023. Prior to joining Brighton Jones, she was a Senior Associate at Standish Management LLC (2022-2023); an Analyst at Brighton Jones (2021-2022); an Intern at Ferguson Wellman Capital Management (2020); and an Intern at Summa group of Oppenheimer & Co. (2018-2020).

Ms. Kuhnert has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**David H. Lamp**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about David H. Lamp that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about David H. Lamp is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

David H. Lamp was born in 1973. Mr. Lamp graduated from University of Arizona in 1995 with a Bachelor of Arts degree in General Business. Mr. Lamp joined Brighton Jones as an Advisor in 2011 and has been a Lead Advisor since 2018.

Mr. Lamp has been a **CERTIFIED FINANCIAL PLANNER™** since 2007. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**David Langhals**  
**Brighton Jones, LLC**

445 Bush Street, 6<sup>th</sup> Floor,  
San Francisco, CA 94108  
(415) 673-3632

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about David Langhals that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about David Langhals is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

David Langhals was born in 1991. Mr. Langhals graduated from Ohio State University in 2013. Mr. Langhals joined Brighton Jones as a Lead Advisor in 2024. Prior to Joining Brighton Jones he was a Financial Advisor at Summitry (2020-2024).

Mr. Langhals has been a **CERTIFIED FINANCIAL PLANNER™** since 2018. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Kory B. Leadon**  
**Brighton Jones, LLC**

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Scottsdale, AZ 85251  
(480) 353-2456

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Kory B. Leadon that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Kory B. Leadon is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kory B. Leadon was born in 1977. Mr. Leadon graduated in 2000 from Seattle Pacific University with a Bachelor of Arts degree in Business Administration with a concentration in Finance. Mr. Leadon has been a Lead Advisor at Brighton Jones since 2004 and became a Senior Lead Advisor in 2020.

Mr. Leadon has been a **CERTIFIED FINANCIAL PLANNER™** since 2005. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Kaycee K. LeCong**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Kaycee K. LeCong that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Kaycee K. LeCong is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kaycee K. LeCong was born in 1986. Ms. LeCong graduated from Washington State University with a Bachelor of Arts in Finance. Ms. LeCong joined Brighton Jones as an Advisor in 2007 and has been a Lead Advisor since 2016.

Ms. LeCong has been a **CERTIFIED FINANCIAL PLANNER™** since 2014. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily

responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Hailey L. Leister**  
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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Hailey L. Leister that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Hailey L. Leister is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Hailey L. Leister was born in 1999. Ms. Leister graduated from University of Arizona with a Bachelor of Arts in Economics and Political Science in 2021. She joined Brighton Jones as an Associate Advisor in 2021. Prior to joining Brighton Jones, Hailey was a Student Tutor for Arizona Athletics CATS Academics (2019-2020) and a Registered Investment Advisor Intern at Charles Schwab & Co. (2020).

Ms. Leister has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Leister has been a **CERTIFIED FINANCIAL PLANNER™** since 2023. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Christian D. Linares**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Christian D. Linares that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Christian D. Linares is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Christian D. Linares was born in 1995. Mr. Linares graduated in 2018 from Santa Clara University with a Bachelor of Science in Finance. Mr. Linares has been an Advisor at Brighton Jones since 2021. Previously, Mr. Linares was an Associate Advisor (2020); Business Development Analyst (2019); and an Associate Advisor (2018) at Brighton Jones. Prior to joining Brighton Jones, he held an intern position at CRH plc.

Mr. Linares has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Linares has been a **CERTIFIED FINANCIAL PLANNER™** since 2020. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

**ITEM 6 / SUPERVISION**

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**James H. MacDonell**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about James H. MacDonell that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about James H. MacDonell is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

James H. MacDonell was born in 1982. Mr. MacDonell graduated from the College of Charleston in 2005 with a Bachelor of Science in Accountancy. He obtained a Master of Science in Accountancy from Villanova University in 2006. Mr. MacDonell joined Brighton Jones as an Advisor in 2014 and became a Lead Advisor in 2017. Prior to joining Brighton Jones, he was a manager with PricewaterhouseCoopers, LLP in the Personal Financial Services group.

Mr. MacDonell has been a **CERTIFIED FINANCIAL PLANNER™** since 2010. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. MacDonell is a **CERTIFIED PUBLIC ACCOUNTANT (CPA)** in the State of Virginia. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**John Peter (JP) Mather**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about JP Mather that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about JP Mather is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

John Peter (JP) Mather was born in 1991. Mr. Mather graduated in 2015 from University of Washington with a Bachelor of Science degree in Business Administration. Mr. Mather joined Brighton Jones in 2020 as an Associate Advisor and has been an Advisor since 2022. Prior to joining Brighton Jones, Mr. Mather was a Senior Financial Analyst at VICIS, Inc. from 2017-2019 and an Audit Associate at KPMG, LLP from 2015-2017.

Mr. Mather has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Mather has been a **CERTIFIED FINANCIAL PLANNER™** since 2021. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Mather is a **CERTIFIED PUBLIC ACCOUNTANT (CPA)** in the State of Washington. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

#### ITEM 6 / SUPERVISION

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**Jerome F. McCarthy III**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Jerome F. McCarthy III that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jerome F. McCarthy III is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jerome F. McCarthy III was born in 1968. Mr. McCarthy graduated from Washington State University with a Bachelor of Science degree in Psychology. Mr. McCarthy joined Brighton Jones as a Lead Advisor in 2003.

Mr. McCarthy has been a **CERTIFIED FINANCIAL PLANNER**<sup>™</sup> since 2006. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

#### ITEM 6 / SUPERVISION

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Investment Advisers Act (“Act”). The Registrant’s Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant’s policies and procedures and overseeing the activities of the Registrant’s supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant’s supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Jackson McCarthy**  
**Brighton Jones, LLC**

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Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Jackson McCarthy that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jackson McCarthy is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jackson McCarthy was born in 1998. Mr. McCarthy graduated from the University of Washington with a Bachelor's degree in Finance and Information systems from the University of Washington in 2021. He joined Brighton Jones as an Associate Advisor in 2025.

Mr. McCarthy has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Kathryn K. McDonald**  
**Brighton Jones, LLC**

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Portland, OR 97209  
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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Kathryn K. McDonald that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Kathryn K. McDonald is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kathryn K. McDonald was born in 1989. She graduated from Portland State University in 2018 with a Bachelor of Arts in Sociology. Ms. McDonald joined Brighton Jones as an Associate Advisor in 2021 and has been an Advisor since 2023. Prior to joining Brighton Jones, Katy was a Registered Representative at Royal Alliance from 2018-2021.

Ms. McDonald has passed the North American Securities Administrators Association (NASAA) Uniform Combined State Law Examination (**Series 66**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. McDonald has been a **CERTIFIED FINANCIAL PLANNER**<sup>™</sup> since 2022. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Kristine McHugh**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Kristine McHugh that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Kristine McHugh is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kristine McHugh was born in 1965. Ms. McHugh graduated from Western Governor's University with a Bachelor's of Business Administration in 2016. Ms. McHugh joined Brighton Jones in 2018 as a Lead Advisor. Prior to joining Brighton Jones, she was an Advisor at Private Ocean (formerly Lakeview Financial Group) from 2014 to 2017 and a Paraplanner at Lakeview Financial Group from 2008 to 2013.

Ms. McHugh has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. McHugh has been a **CERTIFIED FINANCIAL PLANNER™** since 2016. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Patrick D. Melvin**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Patrick D. Melvin that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Patrick D. Melvin is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Patrick D. Melvin was born in 1986. Mr. Melvin graduated from Villanova University with a Bachelor of Arts and Sciences degree. He has been a Lead Advisor at Brighton Jones since 2023. Prior to joining Brighton Jones, he was a High-Net-Worth Financial Advisor at Vanguard from 2022-2023 and a Wealth Manager at Modera Wealth Management from 2018-2022.

Mr. Melvin has been a **CERTIFIED FINANCIAL PLANNER™** since 2017. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Lauren M. Mercer**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Lauren M. Mercer that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Lauren M. Mercer is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Lauren M. Mercer was born in 1993. Ms. Mercer graduated in 2015 from University of South Carolina with a Bachelor of Science degree in Business Administration. Ms. Mercer joined Brighton Jones as an Advisor in 2020 and has been a Lead Advisor since 2023. Prior to joining Brighton Jones, Ms. Mercer was a Financial Advisor (2017-2020) and a High-Net-Worth Investment Consultant (2015-2017) at Vanguard.

Ms. Mercer has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Mercer has been a **CERTIFIED FINANCIAL PLANNER™** since 2019. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

#### ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Shaun Mize**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Shaun Mize that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Shaun Mize is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Shaun Mize was born in 1994. Mr. Mize graduated with a Bachelor's in Business Management at United States Air Force Academy. He joined Brighton Jones as an Associate Advisor in 2023.

Mr. Mize has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address

those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Daniel Moore**  
**Brighton Jones, LLC**

111 W. Illinois St., Suite 500  
Chicago, IL 60654  
(872) 336-0406

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Daniel Moore that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Daniel Moore is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Daniel Moore was born in 1989. Mr. Mize graduated with a Bachelor's degree in Business Administration from the University of Missouri in 2011. He joined Brighton Jones as a Lead Advisor in 2025.

Mr. Moore has been a **CERTIFIED FINANCIAL PLANNER™** since 2023. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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## ITEM 6 / SUPERVISION

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those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Christopher Moreton**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5080

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Christopher Moreton that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Christopher Moreton is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Christopher Moreton was born in 1996. Mr. Moreton graduated with a Bachelor of Arts degree in Business Administration from Seattle Pacific University in 2018. He joined Brighton Jones as an Retirement Plan Consultant in 2024.

Mr. Moreton has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Matthew L. Mormino**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5080

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Matthew L. Mormino that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Matthew L. Mormino is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Matthew L. Mormino was born in 1982. Mr. Mormino graduated from University of Pennsylvania in 2004 with a Bachelor of Arts degree in European History. Mr. Mormino has been a Senior Lead Advisor at Brighton Jones since 2020. He joined Brighton Jones in 2008 and has also held Advisor and Lead Advisor positions.

Mr. Mormino has been a **CERTIFIED FINANCIAL PLANNER™** since 2011. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

#### ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the

Investment Advisers Act (“Act”). The Registrant’s Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant’s policies and procedures and overseeing the activities of the Registrant’s supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant’s supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Estefani M. Morris**  
**Brighton Jones, LLC**

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Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Estefani M. Morris that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Estefani M. Morris is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Estefani M. Morris was born in 1992. Ms. Morris graduated in 2015 from University of Virginia with a Bachelor of Arts in Sociology, Minor in Politics. Ms. Morris has been an Advisor at Brighton Jones since 2023. Previously, she was an Associate Advisor (2020-2022) and a Client Service Associate (2019). Prior to joining Brighton Jones, Ms. Morris was a Client Manager Administrator (2017-2019) and an Administrative Associate (2015-2017) at Pathstone (f.k.a. Cornerstone Advisors, Inc.).

Ms. Morris has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Morris has been a **CERTIFIED FINANCIAL PLANNER™** since 2022. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

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procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act (“Act”). The Registrant’s Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant’s policies and procedures and overseeing the activities of the Registrant’s supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant’s supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Brian W. Morton II**  
**Brighton Jones, LLC**

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Dallas, TX 75206  
(469) 722-1526

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Brian W. Morton II that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Brian W. Morton II is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Brian W. Morton II was born in 1993. Mr. Morton graduated with a Bachelor's degree in Business Management from Goucher college. He has been an Advisor at Brighton Jones since 2023. Prior to joining Brighton Jones Mr. Morton was a Paraplanner at Evensky & Katz from 2018 – 2023.

Mr. Morton has been a **CERTIFIED FINANCIAL PLANNER™** since 2022. *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Scott T. Moser**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Scott T. Moser that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Scott T. Moser is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Scott T. Moser was born in 1996. Mr. Moser graduated in 2019 from University of Wisconsin-Madison with a Bachelor of Science in Personal Finance – Financial Planning. Mr. Moser joined Brighton Jones as an Associate Advisor in 2021 and has been an Advisor since 2023. Prior to joining Brighton Jones, he was an Associate Wealth Advisor at CliftonLarsonAllen Wealth Advisors (2019-2021) and a College Financial Representative at Northwestern Mutual (2018-2019).

Mr. Moser has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Moser has been a **CERTIFIED FINANCIAL PLANNER™** since 2022. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Samuel T. Murphy**  
**Brighton Jones, LLC**

1676 International Drive, Suite 640,  
McLean, VA 22102  
(703) 682-1470

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Samuel T. Murphy that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Samuel T. Murphy is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Samuel T. Murphy was born in 1999. Mr. Murphy graduated in 2021 from Washington and Lee University with a Bachelor of Science in Business Administration. He joined Brighton Jones as an Associate Advisor in 2021.

Mr. Murphy has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Daniel W. Neish**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Daniel W. Neish that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Daniel W. Neish is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Daniel W. Neish was born in 1995. Mr. Neish graduated from Elon University with a Bachelor's degree in Finance and Accounting. Mr. Neish has been an Advisor since 2023. Mr. Neish joined Brighton Jones as an Associate Advisor in 2022. He previously served as a Client Service Associate at Laird Norton Wealth Management from 2018-2021 and an Associate Advisor at Trellis Advisors from 2021-2022.

Mr. Neish has been a **CERTIFIED FINANCIAL PLANNER™** since 2017. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

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of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Elissa Nelson**  
**Brighton Jones, LLC**

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Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Elissa Nelson that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Elissa Nelson is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Elissa Nelson was born in 1994. Ms. Nelson graduated with a Bachelor's in Agricultural Economics at Washington State University. She joined Brighton Jones as an Associate Advisor in 2023.

Ms. Nelson has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Thomas W. Newbold**  
**Brighton Jones, LLC**

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Scottsdale, AZ 85251  
(480) 353-2456

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Thomas W. Newbold that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Thomas W. Newbold is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Thomas W. Newbold was born in 1985. Mr. Newbold joined Brighton Jones as a Client Service Associate in 2018 and became an Associate Advisor in 2020. Prior to joining Brighton Jones, he was a Client Service Associate at JPMorgan from 2012 to 2018 and a Personal Banker at JPMorgan Chase from 2009 to 2012.

Mr. Newbold has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Elizabeth K. Norris**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Elizabeth K. Norris that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Elizabeth K. Norris is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Elizabeth K. Norris was born in 1997. Ms. Norris graduated in 2019 from Seattle Pacific University with a Bachelor of Arts in Business Administration. Ms. Norris joined Brighton Jones as an Associate Advisor in 2019 and has been an Advisor at Brighton Jones since 2023.

Ms. Norris has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Norris has been a **CERTIFIED FINANCIAL PLANNER™** since 2022. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

#### ITEM 6 / SUPERVISION

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**Stephen B. O'Dell**  
**Brighton Jones, LLC**

825 Town and Country Lane, Suite 1200  
Houston, TX 77024  
(713) 231-0870

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Stephen O'Dell that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Stephen O'Dell is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Stephen O'Dell was born in 1990. He graduated from Texas Tech University in 2017 with a Master of Science in Personal Financial Planning; he also earned his Bachelor of Science in Personal Financial Planning from Texas Tech University in 2016. Mr. O'Dell joined Brighton Jones as a Lead Advisor in 2022. Prior to joining Brighton Jones, Mr. O'Dell was Chief Financial Officer at Stages of Recovery, Inc. from 2012 to 2022.

Mr. O'Dell has been a **CERTIFIED FINANCIAL PLANNER™** since 2019. *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Elise Orton**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Elise Orton that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Elise Orton is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Elise Orton was born in 2001. Ms. Orton graduated with a Bachelor's degree in Finance from Washington State University. She has been an Associate Advisor at Brighton Jones since 2023. Prior to joining Brighton Jones she was a Summer Intern at Gallagher Insurance in 2021 and a Wealth Management Intern at Brighton Jones in 2022.

Ms. Orton has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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## Marieteo Padiong Brighton Jones, LLC

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Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Marieteo Padiong that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Marieteo Padiong is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Marieteo Padiong was born in 1998. Ms. Padiong graduated from Utah Valley University in 2020 where she earned a Bachelor of Science degree in Personal Financial Planning. Ms. Padiong joined Brighton Jones as an Associate Advisor in 2020.

Ms. Padiong has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Padiong is also an **Accredited Financial Counselor**® (**AFC**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

### ITEM 3 / DISCIPLINARY INFORMATION

None.

### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Olivia Peluso**  
**Brighton Jones, LLC**

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San Francisco, CA 94108  
(415) 673-3632

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Olivia Peluso that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Olivia Peluso is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Olivia Peluso was born in 1998. Ms. Padiong graduated with a Bachelor's in Finance at San Diego State University. Ms. Peluso joined Brighton Jones as an Associate Advisor in 2023.

Ms. Peluso has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Jeremy M. Pond**  
**Brighton Jones, LLC**

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San Francisco, CA 94108  
(415) 673-3632

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Jeremy M. Pond that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jeremy M. Pond is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

**ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Jeremy M. Pond was born in 1990. Mr. Pond graduated from University of San Francisco in 2014 with a Bachelor of Science in Business Economics. Mr. Pond joined Brighton Jones as an Associate Advisor in 2018; became an Advisor in 2020; and has been a Lead Advisor since 2022. Previously, Mr. Pond was at Wells Fargo Bank as an AVP, Regional Private Banker from 2013 – 2018 and also with Wells Fargo Advisors as a Brokerage Associate from 2012 to 2018.

Mr. Pond has been a **CERTIFIED FINANCIAL PLANNER™** since 2016. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

**ITEM 3 / DISCIPLINARY INFORMATION**

None.

**ITEM 4 / OTHER BUSINESS ACTIVITIES**

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**ITEM 5 / ADDITIONAL COMPENSATION**

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

**ITEM 6 / SUPERVISION**

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**Jacqueline M. Prideaux**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Jacqueline M. Prideaux that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jacqueline M. Prideaux is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jacqueline M. Prideaux was born in 1985. Ms. Prideaux graduated from Marquette University in 2007 with Honors Bachelor of Arts degrees in Economics and International Politics and a minor in French. Ms. Prideaux joined Brighton Jones as a Client Service Coordinator in 2012; became an Associate Advisor in 2015; and has served as a Lead Advisor since 2017. Prior to working for Brighton Jones, Ms. Prideaux served in the United States Peace Corps in Senegal, West Africa from 2009-2011.

Ms. Prideaux has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Prideaux has been a **CERTIFIED FINANCIAL PLANNER™** since 2015. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Nicholas Pursley**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Nicholas Pursley that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Nicholas Pursley is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Nicholas Pursley was born in 1992. Mr. Pursley graduated from California Polytechnic State University in 2014 with a Bachelor of Science in Business Administration. Mr. Pursley joined Brighton Jones as an Associate Advisor in July 2018 and became a Lead Advisor in 2020. Prior to working for Brighton Jones, Mr. Pursley held the following positions at Verus: Analyst (2014-2015); Senior Analyst (2016); Consulting Associate (2016-2018).

Mr. Pursley has been a **CERTIFIED FINANCIAL PLANNER™** since 2019. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Pursley is also a **CFA® Charterholder**. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Jesica J. Ray**  
**Brighton Jones, LLC**

8270 Greensboro Drive, Suite 725  
McLean VA, 22102  
(703)682-1470

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Jesica J. Ray that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jesica J. Ray is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jesica J. Ray was born in 1992. Ms. Ray graduated in 2014 from Dickinson College with a Bachelor of Arts degree in Law & Policy, minoring in Economics. Ms. Ray has been a Lead Advisor at Brighton Jones since 2020. Previously, she served clients at Brighton Jones as an Advisor (2019); an Associate Advisor (2018); and a Client Service Coordinator (2015-2017). Prior to joining Brighton Jones, Ms. Ray worked from 2014-2015 as an Investment Operations Associate on the Hedge Fund Data Team at Cambridge Associates.

Ms. Ray has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Ray has been a **CERTIFIED FINANCIAL PLANNER™** since 2018. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Ray has been a **CERTIFIED DIVORCE FINANCIAL ANALYST™** since 2023. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Shyanne R. Render**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Shyanne Render that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Shyanne Render is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Shyanne Render was born in 1993. Ms. Render earned her Bachelor of Business Administration in Finance in 2015 from University of Washington's Foster School of Business. Ms. Render has been a Lead Advisor at Brighton Jones since 2022. Previously, she served clients at Brighton Jones as an Advisor (2019-2021); Associate Advisor (2018); and an Investment Analyst (2015-2017).

Ms. Render has been a **CERTIFIED FINANCIAL PLANNER™** since 2018. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Kyle A. Rice**  
**Brighton Jones, LLC**

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Scottsdale, AZ 85251  
(480) 353-2456

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Kyle A. Rice that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Kyle A. Rice is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kyle A. Rice was born in 1999. Mr. Rice graduated from University of Arizona in 2020 with a Bachelor of Science degree in Business Administration. Kyle joined Brighton Jones as an Associate Advisor in 2021. Prior to joining Brighton Jones, he was an Advisor Analyst at Redwood Investment Management in 2021.

Mr. Rice has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Rice has been a **CERTIFIED FINANCIAL PLANNER™** since 2023. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Andrew M. Richardson**  
**Brighton Jones, LLC**

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Boston, MA 02116  
(617) 941-5644

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Andrew M. Richardson that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Andrew M. Richardson is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Andrew Richardson was born in 1993. Mr. Richardson graduated from Gettysburg College in 2020 with a Bachelor of Arts degree in Organizational Management and Business. He joined Brighton Jones as a Lead Advisor in 2022. Prior to joining Brighton Jones, he was a Wealth Advisor at Monument Group Wealth Advisors from 2020-2022; an Associate at Dimensional Fund Advisors from 2018-2020; and an Associate, Wealth Strategy at Boston Private Financial Holdings from 2016-2018.

Mr. Richardson has been a **CERTIFIED FINANCIAL PLANNER™** since 2018. *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the

activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Jacob J. Ries-Roncalli**  
**Brighton Jones, LLC**

39-45 Newbury Street, Suite 404  
Boston, MA 02116  
(617) 941-5644

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Jacob J. Ries-Roncalli that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jacob J. Ries-Roncalli is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jacob J. Ries-Roncalli was born in 1999. He earned his BABA degree in Finance and Business Economics in 2021 from Seattle University. Mr. Ries-Roncalli joined Brighton Jones as an Associate Advisor in 2021.

Mr. Ries-Roncalli has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Ries-Roncalli has been a **CERTIFIED FINANCIAL PLANNER™** since 2023. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Andres Rivera-Uribe**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Andres Rivera-Uribe that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Andres Rivera-Uribe is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

**ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Andres Rivera-Uribe was born in 2000. He earned his Bachelor's degree in Finance and Financial Management Services in 2023 from Seattle University. Mr. Rivera-Uribe joined Brighton Jones as an Associate Advisor in 2023.

Mr. Rivera-Uribe has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

**ITEM 3 / DISCIPLINARY INFORMATION**

None.

**ITEM 4 / OTHER BUSINESS ACTIVITIES**

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**ITEM 5 / ADDITIONAL COMPENSATION**

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

**ITEM 6 / SUPERVISION**

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responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

## Gabrielle Sabatini

### Brighton Jones, LLC

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McLean, VA 22102  
(703) 682-1470

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Gabrielle Sabatini that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Gabrielle Sabatini is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Gabrielle Sabatini was born in 2002. She earned her Bachelor's degree in Finance at Penn State University. Ms. Sabatini joined Brighton Jones as an Associate Advisor in 2024.

Ms. Sabatini has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the

activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Maico Santos**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Maico Santos that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Maico Santos is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Maico Santos was born in 1994. Mr. Santos graduated from Washington State University with a Bachelor's degree in Finance and Human Resources Management. He has been an Associate Advisor at Brighton Jones since 2023. Prior to Brighton Jones, Mr. Santos was a Bank Teller, Lead Teller, and Personal Banker at Wells Fargo from 2017-2021.

Mr. Santos has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

#### ITEM 6 / SUPERVISION

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activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Brevin M. Schmidt**  
**Brighton Jones, LLC**

445 Bush Street, 6<sup>th</sup> Floor,  
San Francisco, CA 94108  
(415) 673-3632

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Brevin M. Schmidt that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Brevin M. Schmidt is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Brevin M. Schmidt was born in 1996. Mr. Schmidt graduated in 2019 from Oregon State University with a Bachelor of Science degree in Accounting. Mr. Schmidt joined Brighton Jones in 2020 as an Associate Advisor. Prior to joining Brighton Jones, he was a Personal Banker at HSBC from 2019 - 2020.

Mr. Schmidt has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Nathan Schult**  
**Brighton Jones, LLC**

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Palo Alto, CA 94301  
(650) 618-3400

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Nathan Schult that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Nathan Schult is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Nathan Schult was born in 1998. Mr. Schult graduated from Concordia University with a Bachelor's degree in Finance and Accounting. He joined Brighton Jones as an Associate Advisor in 2023. Prior to joining Brighton Jones, Mr. Schult was on the Tax staff at Ernst & Young from 2021-2022.

Mr. Schult has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

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of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Rory Shanks**  
**Brighton Jones, LLC**

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(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Rory Shanks that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Rory Shanks is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Rory Shanks was born in 2002. He earned his Bachelor's degree in Business at Gonzaga University. Mr. Shanks joined Brighton Jones as an Associate Advisor in 2024.

Mr. Shanks has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Jason Shull**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Jason Shull that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jason Shull is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jason Shull was born in 1973. Mr. Shull graduated from the University of Montana in 1996 with a Bachelor of Science degree in Finance and a Minor in Economics. Mr. Shull joined Brighton Jones as an Advisor in 2012 and has served as a Lead Advisor since 2017.

Mr. Shull has been a **CERTIFIED FINANCIAL PLANNER™** since 2004. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Meredith Sims**  
**Brighton Jones, LLC**

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(469) 722-1526

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Meredith Sims that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Meredith Sims is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Meredith Sims was born in 2002. She earned her Bachelor's degree in Accounting at Michigan State University. Ms. Sims joined Brighton Jones as an Associate Advisor in 2024.

Ms. Sims has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Matthew Sisco**  
**Brighton Jones, LLC**

1624 NW Lovejoy Street  
Portland, OR 97209  
(503) 594-7400

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Matthew Sisco that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Matthew Sisco is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Matthew Sisco was born in 2002. He earned his Bachelor's degree at University of Oregon. Mr. Sisco joined Brighton Jones as an Associate Advisor in 2024.

Mr. Sisco has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Shaun Mize**  
**Brighton Jones, LLC**

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Scottsdale, AZ 85251  
(480) 353-2456

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Shaun Mize that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Shaun Mize is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Shaun Mize was born in 1994. Mr. Mize graduated with a Bachelor's in Business Management at United States Air Force Academy. He joined Brighton Jones as an Associate Advisor in 2023.

Mr. Mize has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Jacob Siuta**  
**Brighton Jones, LLC**

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McLean, VA 22102  
(703) 682-1470

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Jacob Siuta that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jacob Siuta is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jacob Siuta was born in 2000. Mr. Siuta graduated with a Bachelor's degree in Finance from Virginia Tech in 2022. He joined Brighton Jones as an Associate Advisor in 2022.

Mr. Siuta has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Siuta has been a **CERTIFIED FINANCIAL PLANNER™** since 2024. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the

activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Greer T. Smith**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Greer T. Smith that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Greer T. Smith is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Greer T. Smith was born in 1975. Mr. Smith graduated from the University of Washington in 1998 with a Bachelor of Arts degree in Society & Justice and Sociology. Mr. Smith joined Brighton Jones as a Lead Advisor in 2012 and became a Senior Lead Advisor in 2020. Prior to joining Brighton Jones, he worked at Charles Schwab as a Vice President and Financial Consultant from 2001 to 2011 and at Olde Discount Corporation as a Financial Consultant from 1998 to 2001.

Mr. Smith has been a **CERTIFIED FINANCIAL PLANNER™** since 2005. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Zachary W. Smith**  
**Brighton Jones, LLC**

530 Lytton Ave., 2<sup>nd</sup> Floor,  
Palo Alto, CA 94301  
(650) 618-3400

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Zachary W. Smith that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Zachary W. Smith is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Zachary W. Smith was born in 1990. Mr. Smith graduated from University of California Santa Cruz in 2012 with a Bachelor of Arts in Economics. Mr. Smith joined Brighton Jones as an Associate Advisor in 2016; became an Advisor 2018; and became a Lead Advisor in 2019. Prior to joining Brighton Jones, he was a Wealth Adviser at ClearPath Capital Partners from 2012-2016.

Mr. Smith has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Smith has been a **CERTIFIED FINANCIAL PLANNER™** since 2015. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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## Michael Stevens Brighton Jones, LLC

1676 International Drive, Suite 640,  
McLean, VA 22102  
(703) 682-1470

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Michael Stevens that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Michael Stevens is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael Stevens was born in 2000. Mr. Stevens graduated with a Bachelor's degree in Finance from Virginia Tech University. He has been an Associate Advisor at Brighton Jones since 2023. Prior to joining Brighton Jones, Mr. Stevens was an intern at Global Advisor Group from 2022 - 2023.

Mr. Stevens has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

### ITEM 3 / DISCIPLINARY INFORMATION

None.

### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### ITEM 5 / ADDITIONAL COMPENSATION

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### ITEM 6 / SUPERVISION

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of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Kaleb T. Strawn**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Kaleb T. Strawn that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Kaleb T. Strawn is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

**ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE**

Kaleb T. Strawn was born in 1994. Mr. Strawn graduated in 2017 from Saint Martin's University with a Degree in Business Administration (Concentration in Finance and Economics). Mr. Strawn joined Brighton Jones as an Associate Advisor 2021. Before Brighton Jones, Mr. Strawn worked at Avier Wealth Advisors as an Associate Advisor from 2020 to 2021 and a Client Services Associate from 2017 to 2020.

Mr. Strawn has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Mr. Strawn has been a **CERTIFIED FINANCIAL PLANNER™** since 2021. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

**ITEM 3 / DISCIPLINARY INFORMATION**

None.

**ITEM 4 / OTHER BUSINESS ACTIVITIES**

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

**ITEM 5 / ADDITIONAL COMPENSATION**

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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**Ardavan Tabrizian**  
**Brighton Jones, LLC**

1624 NW Lovejoy Street  
Portland, OR 97209  
(503) 594-7400

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Ardavan Tabrizian that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Ardavan Tabrizian is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Ardavan Tabrizian was born in 2001. He earned his Bachelor's degree in Finance at University of Oregon. Mr. Tabrizian joined Brighton Jones as an Associate Advisor in 2023.

Mr. Tabrizian has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Brian Tall**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Brian Tall that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Brian Tall is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Brian Tall was born in 1982. Mr. Tall graduated with a Bachelor of Arts degree in Business from the University of Puget Sound in 2005 and graduated with a Master of Science degree in Finance from the University of St. Andrews in 2006. He joined Brighton Jones in 2007 and became the Chief Investments Officer in March 2018.

Mr. Tall has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Brianna N. Thompson**  
**Brighton Jones, LLC**

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Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Brianna N. Thompson that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Brianna N. Thompson is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Brianna N. Thompson was born in 2000. Ms. Thompson graduated with a Bachelor's degree in Finance and International Business from Gonzaga University. She has been an Associate Advisor at Brighton Jones since 2022. Prior to joining Brighton Jones, Ms. Thompson was a Customer Service Associate at Wheel Fun Rentals in 2019 and a Finance Intern at Aero Precision in 2021.

Ms. Thompson has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

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**Kevin Ting**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Kevin Ting that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Kevin Ting is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Kevin Ting was born in 1997. He earned his Bachelor's degree at University of Oregon. Mr. Ting joined Brighton Jones as an Associate Advisor in 2023.

Mr. Ting has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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**Ethan H. Truong**  
**Brighton Jones, LLC**

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(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Ethan H. Truong that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Ethan H. Truong is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Ethan Truong was born in 2000. He graduated from University of Washington in 2021 with a Bachelor of Arts degree in Economics. Mr. Truong joined Brighton Jones as an Associate Advisor in 2022. Prior to joining Brighton Jones, Mr. Truong was a Broker Assistant at John L. Scott from 2021-2022.

Mr. Truong has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Connor M. Upham**  
**Brighton Jones, LLC**

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McLean, VA 22102  
(703) 682-1470

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Connor M. Upham that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Connor M. Upham is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Connor M. Upham was born in 1998. Mr. Upham graduated with a Bachelor's degree in Economics from Dickinson College. He has been an Associate Advisor at Brighton Jones since 2022. Prior to joining Brighton Jones, Mr. Upham was a Portfolio Management Systems Analyst from 2015 – 2018 and 2020 – 2021.

Mr. Upham has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

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## Anallely Valdez-Johnson

### Brighton Jones, LLC

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Anallely Valdez-Johnson that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Anallely Valdez-Johnson is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Anallely Valdez-Johnson was born in 1994. She graduated with a Bachelor's degree in Anthropology from the University of Washington in 2016. She joined Brighton Jones as an Associate Advisor in 2022.

Ms. Valdez-Johnson has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

## Joseph G. Volcheck Brighton Jones, LLC

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Joseph G. Volcheck that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Joseph G. Volcheck is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Joseph G. Volcheck was born in 1994. Mr. Volcheck graduated from Creighton University in 2016 with a Bachelor of Science in Healthcare Administration & Policy. Mr. Volcheck joined Brighton Jones as an Associate Advisor in 2020. Prior to joining Brighton Jones, he was a Consultant at Cerner Corporation from 2016-2020.

Mr. Volcheck has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

Mr. Volcheck has been a **CERTIFIED FINANCIAL PLANNER™** since 2023. *Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.*

### ITEM 3 / DISCIPLINARY INFORMATION

None.

### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

### ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the

Investment Advisers Act (“Act”). The Registrant’s Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant’s policies and procedures and overseeing the activities of the Registrant’s supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant’s supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Michael L. Welk**  
**Brighton Jones, LLC**

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
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(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Michael L. Welk that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Michael L. Welk is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Michael Welk was born in 1968. Mr. Welk graduated from Pacific Lutheran University in 1990 where he earned a Bachelor of Arts degree in Business Administration. Mr. Welk joined Brighton Jones in 2015 as a Lead Advisor. Prior to joining Brighton Jones, Mr. Welk was a Relationship Manager and Business Development Officer with Strategic Capital Group from 2003 to 2015.

Mr. Welk has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

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**Evelyn Westby**  
**Brighton Jones, LLC**

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(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Evelyn Westby that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Evelyn Westby is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

#### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Evelyn Westby was born in 2000. Ms. Westby graduated with a Bachelor's degree in Finance and Accounting from University of Washington in 2024. She joined Brighton Jones as an Associate Advisor in 2024.

Ms. Westby has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

#### ITEM 3 / DISCIPLINARY INFORMATION

None.

#### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

#### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

#### ITEM 6 / SUPERVISION

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of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

## Brandon White-Szep Brighton Jones, LLC

2030 1<sup>st</sup> Avenue, 3<sup>rd</sup> Floor  
Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Brandon White-Szep that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Brandon White-Szep is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Brandon White-Szep was born in 1986. Mr. White-Szep graduated with a Bachelor's degree in Business Management from Washington State University in 2022. He joined Brighton Jones as an Associate Advisor in December 2024.

Mr. White-Szep has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

### ITEM 3 / DISCIPLINARY INFORMATION

None.

### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Conor Whitney**  
**Brighton Jones, LLC**

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(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Conor Whitney that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Conor Whitney is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Conor Whitney was born in 1993. Mr. Whitney graduated with a Bachelor's degree in Finance from the University of Arizona. He joined Brighton Jones as an Advisor in 2024.

Mr. Whitney is also a **CFA® Charterholder**. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4) -7 policies and procedures is to comply with the requirements of supervision requirements of Section 203(e)(6) of the Investment Advisers Act ("Act"). The Registrant's Chief Compliance Officer, Christina Owens, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address

those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

**Emily L. Wood**  
**Brighton Jones, LLC**

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BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Emily L. Wood that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Emily L. Wood is available on the SEC's website at [adviserinfo.sec.gov](http://adviserinfo.sec.gov).

## ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Emily L. Wood was born in 1994. Ms. Wood earned her Bachelor's degree in Economics from University of Puget Sound in 2017. Ms. Wood joined Brighton Jones as an Associate Advisor in 2017 and has been an Advisor since 2021.

Ms. Wood has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

Ms. Wood has been a **CERTIFIED FINANCIAL PLANNER™** since 2021. Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

## ITEM 3 / DISCIPLINARY INFORMATION

None.

## ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

## ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

## ITEM 6 / SUPERVISION

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responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

## Yaxin (Casey) Zhai Brighton Jones, LLC

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Seattle, WA 98121  
(206) 258-5000

BROCHURE SUPPLEMENT  
DATED 4/1/2025

This Brochure Supplement provides information about Casey Zhai that supplements the Brighton Jones, LLC Brochure. You should have received a copy of that Brochure. Please contact Christina Owens, Chief Compliance Officer, if you did not receive Brighton Jones, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Casey Zhai is available on the SEC's website at [adviserinfo.sec.gov](https://adviserinfo.sec.gov).

### ITEM 2 / EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Casey Zhai was born in 1996. Ms. Zhai graduated with a Bachelor's degree in Accounting from Arcadia University in 2017, a Master's degree in Computer Information Technology from the University of Pennsylvania in 2023, and a Master's degree in Accounting and Business Analytics from the University of Pittsburgh in 2019. She joined Brighton Jones as an Associate Advisor in 2025.

Ms. Zhai has passed the North American Securities Administrators Association (NASAA) Uniform Investment Advisor Law Examination (**Series 65**). Please click [here](#) or turn to the Appendix at the end of this document for more information about the designation described above.

### ITEM 3 / DISCIPLINARY INFORMATION

None.

### ITEM 4 / OTHER BUSINESS ACTIVITIES

The supervised person is not actively engaged in any other investment-related businesses or occupations.

The supervised person is not actively engaged in any non-investment-related business or occupation for compensation.

### ITEM 5 / ADDITIONAL COMPENSATION

The Registrant offers variable compensation to its employees for introducing new clients. To mitigate any potential conflict of interest, Registrant maintains a thorough discovery process in which prospective clients are involved in in-depth conversations to determine whether the engagement is a good fit and in the best interest of the client.

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activities of the Registrant's supervised persons. Should an employee or investment adviser representative of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Christina Owens at (206) 258-5000.

# APPENDIX

## Accredited Financial Counselor ® (AFC)

This designation is awarded by the Association of Financial Counseling and Planning Education (AFCPE®). Certification requirements include: Education, Examination, Industry Experience, and Ethics. An Accredited Financial Counselor should be able to demonstrate the ability to educate and assist individuals and families in the process of financial decision making, budgeting and planning.

## Certified Financial Planner™

Certified Financial Planner Board of Standards, Inc. (“CFP Board”) owns the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, and the CFP® certification mark (with flame design) logo in the United States (these marks are collectively referred to as the “CFP® marks”). The CFP Board authorizes use of the CFP® marks by individuals who successfully complete the CFP Board’s initial and ongoing certification requirements.

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 88,000 individuals have obtained CFP® certification.

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

- Education – Complete a college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services or an accepted equivalent, including **completion of a financial plan development capstone course**, and attain a Bachelor’s Degree from an accredited college or university. CFP Board’s financial planning subject areas include professional conduct and regulation, general principles of financial planning, education planning, risk management and insurance planning, investment planning, income tax planning, retirement savings and income planning, and estate planning;
- Examination – Pass the comprehensive CFP® Certification Examination. The examination, administered in 6 hours, 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 – CFP Board requires 6,000 hours of experience through the Standard Pathway, or 4,000 hours of experience through the Apprenticeship Pathway that meets additional requirements; and
- Ethics – Agree to be bound by CFP Board’s *Code of Ethics and Standards of Conduct*, which put clients’ interest first; acknowledge CFP Board’s right to enforce them through its *Disciplinary Rules and Procedures*; comply with the *Financial Planning Practice Standards* which determine what clients should reasonably expect from the financial planning engagement and complete a CFP® Certification Application which requires disclosure of an individual’s background, including involvement in any criminal, civil, governmental, or self-regulatory agency proceeding or inquiry, bankruptcy, customer complaint, filing, termination/internal reviews conducted by the individual’s employer or firm.

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 accepted by the CFP Board 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 – CFP® professionals agree to adhere to the high standards of ethics and practice outlined in CFP Board’s *Code of Ethics and Standards of Conduct* and to acknowledge CFP Board’s right to

enforce them through its Disciplinary Rules and Procedures. The Code of Ethics and Standards of Conduct require that CFP® professionals provide financial planning services in the best interests of their clients.

- Certification Application – Properly complete a Certification Application to (i) acknowledge voluntary adherence to the **terms and conditions of certification with CFP Board** and (ii) disclose any involvement in criminal and civil proceedings, inquiries or investigations, bankruptcy filings, internal reviews and customer complaints.

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 suspension or permanent revocation of their CFP® certification.

You may **verify an individual's CFP®** certification and background through the CFP Board. The verification function will allow you to verify an individual's certification status, CFP Board's disciplinary history and any bankruptcy disclosures in the past ten years. Additional regulatory information may also be found through **FINRA's BrokerCheck** and the **SEC's Investment Adviser Public Disclosure databases**, which are free tools that may be used to conduct research on the background and experience of CFP® professionals and those who held CFP® certification at one time, including with respect to employment history, regulatory actions, and investment-related licensing information, arbitrations, and complaints.

## **Certified Public Accountant (CPA)**

CPAs are licensed and regulated by their state boards of accountancy. While state laws and regulations vary, the education, experience and testing requirements for licensure as a CPA generally include minimum college **education** (typically 150 credit hours with at least a baccalaureate degree and a concentration in accounting), minimum **experience** levels (most states require 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 or verification by a CPA), and successful passage of the Uniform CPA Examination. In order to maintain a CPA license, states generally require the completion of 40 hours of continuing professional education (CPE) each year (or 80 hours over a two-year period or 120 hours over a three-year period). Additionally, all American Institute of Certified Public Accountants (AICPA) members 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 (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. The vast majority of state boards of accountancy have adopted the AICPA's *Code of Professional Conduct* within their state accountancy laws or have created their own. In addition to the *Code of Professional Conduct*, AICPA members who provide personal financial planning services are required to follow the *Statement on Standards in Personal Financial Planning Services* (SSPFPS).

## **Series 65**

The Series 65 is an exam administered by the Financial Industry Regulatory Authority (FINRA). Successful completion of the Series 65 is required in certain states in America in order for an investment professional to qualify for registration as an Investment Advisor Representative.

## **Series 66**

The Series 66 is an exam administered by the Financial Industry Regulatory Authority (FINRA). Successful completion of the Series 66 exam is equivalent to the successful completion of both the Series 63 and Series 65 exams and is required in certain states in America in order for an investment professional to qualify for registration as an Investment Advisor Representative.

## **Certified Student Loan Professional (CSLP®)**

This designation is awarded by the Certified Student Loan Advisors Board of Standards and is used by financial professionals who seek to provide information to clients about how to efficiently repay student loans within the larger scope of their financial plans. Certification requires individuals to have two years

of industry experience in financial services or hold a bachelor's degree in business or finance from an accredited college or university. Individuals must also hold a license or registration in a regulated financial services industry (brokerage, investment adviser services, insurance). Unlicensed individuals providing coaching services may qualify for the certificate program subject to the verification of business and individual qualifications. Designees are required to complete an annual competency exam to ensure that they continue to demonstrate the knowledge required to provide student loan repayment advice to clients.

### **Chartered Life Underwriter (CLU®)**

The CLU® designation, issued by The American College, is designed to provide the holder with in-depth knowledge on the insurance needs of individuals, business owners and professional clients. Candidates must successfully complete a self-study course and examination program, have three years of relevant work experience and comply with a code of ethics. Continuing education for this designation requires 30 hours every two years.

### **Chartered Retirement Planning Counselor (CRPC®)**

The College of Financial Planning® awards the CRPC® designation to applicants who complete the CRPC® professional education program, pass a final examination, commit to a code of ethics and agree to pursue continuing education. Continued use of the CRPC® designation is subject to ongoing renewal requirements. Every two (2) years the designee must renew their right to continue using the CRPC® designation by completing 16 hours of continuing education and reaffirming to abide by the Standards of Professional Conduct.

### **CFA® Charterholder**

CFA® designates an international professional certificate that is offered by the CFA Institute. The Chartered Financial Analyst® (CFA®) 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 170,000 CFA® Charterholders working in over 170 countries and regions. 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.

### **High Ethical Standards**

The CFA Institute Code of Ethics and Standards of Professional Conduct, enforced through an active professional conduct program, require CFA® Charterholders to:

- Place their clients' interests ahead of their own
- Maintain independence and objectivity
- Act with integrity
- Maintain and improve their professional competence
- Disclose conflicts of interest and legal matters

### **Global Recognition**

Passing the three CFA exams is a difficult feat that requires extensive study (successful candidates report spending an average of 300 hours of study per level). Earning the CFA® charter demonstrates mastery of many of the advanced skills needed for investment analysis and decision making in today's quickly evolving global financial industry. As a result, employers and clients are increasingly seeking CFA® Charterholders —often making the charter a prerequisite for employment. Additionally, regulatory bodies in 38 countries/territories recognize the CFA® charter as a proxy for meeting certain licensing requirements, and more than 466 colleges and universities around the world have incorporated a majority of the CFA Program curriculum into their own finance courses.

### **Comprehensive and Current Knowledge**

The CFA Program curriculum provides a comprehensive framework of knowledge for investment decision making and is firmly grounded in the knowledge and skills used every day in the investment profession. The three levels of the CFA Program test a proficiency with a wide range of fundamental and advanced investment topics, including ethical and professional standards, fixed-income and equity analysis, alternative and derivative investments, economics, financial reporting standards, portfolio management, and wealth planning.

The CFA Program curriculum is updated every year by experts from around the world to ensure that candidates learn the most relevant and practical new tools, ideas, and investment and wealth management skills to reflect the dynamic and complex nature of the profession.

### **Certified Estate Planner (CEP®)**

The CEP® certification is issued by National Institute of Certified Estate Planners and is a voluntary certification; no federal or state law or regulation requires financial planners to hold CEP® certification. CEP® professionals must be licensed in either a financial, legal or tax profession and must complete eight modules of study in addition to a proctored exam. CEP® professionals are also required to complete eight hours of continuing education every two years in the area of estate planning.

### **National Social Security Advisor (NSSA®)**

The NSSA® is issued by the National Social Security Association and is a voluntary certification; no federal or state law or regulation requires financial planners to hold NSSA® certification. In order to pursue this designation, individuals must have a job function that includes advising clients about Social Security benefits choices. An NSSA® administered course and a certificate exam are also required. NSSA® professionals are required to complete eight hours of continuing education every two years.

### **Certified Investment Management Analyst® (CIMA®)**

The CIMA® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CIMA® certification. The CIMA® certification is accredited by American National Standards Institute (ANSI).

Prerequisites for the certification include 1) three years of financial services experience and 2) a satisfactory record of ethical conduct, as determined by Investments & Wealth Institute Admission Committee. Certificants must meet education requirements and must pass a Qualification Examination and Certification Examination.

CIMA® certificants must complete 40 hours of continuing education requirements every two years.

### **Certified Divorce Financial Analyst (CDFA®)**

The CDFA® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold a CDFA® certification. The CDFA® certification is accredited by the Institute for Divorce Financial Analysts. CDFAs must have several years of relevant experience and pass an exam to provide knowledge of tax law, asset distribution, and financial planning to achieve equitable settlements for divorcing couples.

Prerequisites for the certification include a bachelor's degree with three years of on-the job experience, or if no bachelor's degree, five years of relevant experience. CDFA® certificants must complete 30 hours of divorce related continuing education requirements every two years.