



Form ADV Part 2B Brochure Supplement

Burney Company

1800 Alexander Bell Drive, Suite 510
Reston, VA 20191
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www.burney.com

10/11/2021

This brochure supplement provides information about The Burney Company's supervised employees that supplements the Burney Company brochure (Form ADV Part 2A). You should have received a copy of that brochure. Please contact the Burney Company at (703) 391-6020 if you did not receive the brochure or if you have any questions about the contents of this supplement.

Additional information about your Portfolio Manager is available on the SEC's website at www.adviserinfo.sec.gov.

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SUPERVISED PERSONS

Name: Lowell D. Pratt

CRD#: 2185935

Year of Birth: 1961

Formal Education after High School:

- ❖ Virginia Tech, BS Finance and Economics, 1985
- ❖ Boston University, MS Banking and Financial Management, 2007

Business Background:

- ❖ Burney Company, Chairman, 11/2020 - present
- ❖ Burney Company, President, 06/2003 – present
- ❖ Burney Partners LLC, Partner, Portfolio Manager, 1986 – present

Certifications

- ❖ CFA charterholder (Chartered Financial Analyst), 1989

This designation is issued by the CFA Institute and is granted to individuals who meet all of the following prerequisites: possess an undergraduate degree and four years of professional experience in investment decision-making. The candidate is required to follow a rigorous self-study and exam program.

- ❖ Holds the Series 65 Investment Adviser Representative license.

The Series 65 is an exam given by FINRA requiring the prospective adviser representative to demonstrate satisfactory knowledge of the securities market, how securities are transacted and proper management of funds. Those candidates who pass the exam are considered to have met the minimum competency level. The exam needs to be retaken if the adviser representative has not been associated with a registered investment adviser for more than two years.

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision:

- ❖ All Portfolio Managers (PMs) and supervised persons must adhere to the rules and procedures described in The Burney Company's Compliance Manual as well as the Company's Code of Ethics. PMs must submit periodic reports to the compliance department where forensic tests are performed to ensure compliance. PMs are also subject to periodic inspections by the compliance department.
- ❖ William Stewart, Chief Compliance Officer and Head of the Analytical Group, supervises Lowell Pratt, the President of The Burney Company. Lowell Pratt supervises all other PMs. For further information please call William Stewart at (703) 531-0405 or Lowell Pratt at (703) 391-6020.

Name: Yevgeniy Gushcha

CRD#: 5713195

Year of Birth: 1979

Formal Education after High School:

- ❖ American University, BS Business Administration/Finance, 2000
- ❖ Kuban State University (Krasnodar, Russia), PhD, Economics, 2004

Business Background:

- ❖ Burney Partners LLC, Partner, Portfolio Manager, 11/2012 - present
- ❖ Burney Associates, LLC, Partner/Portfolio Manager, 10/2009 – 11/2012
- ❖ Burney Partners LLC, Associate Portfolio Manager, 01/2007 – 11/2012
- ❖ Burney Company, Investment Analyst, 07/2000 – 12/2006

Certifications:

- ❖ Holds the Series 65 Investment Adviser Representative license

The Series 65 is an exam given by FINRA requiring the prospective adviser representative to demonstrate satisfactory knowledge of the securities market, how securities are transacted and proper management of funds. Those candidates who pass the exam are considered to have met the minimum competency level. The exam needs to be retaken if the adviser representative has not been associated with a registered investment adviser for more than two years.

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision:

- ❖ All employees of Burney Partners are supervised by Lowell Pratt. For any further questions Lowell Pratt can be reached at 703-391-6020.

Name: Robert A. Hardesty, Jr.

CRD#: 4196515

Year of Birth: 1974

Formal Education after High School:

- ❖ George Mason University, BA Speech Communication, 1997

Business Background:

- ❖ Burney Partners LLC, Partner, Director of Business Development, 07/2005 – present

Certifications:

- ❖ Holds the Series 65 Investment Adviser Representative license

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Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision:

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Name: Andrew Pratt

CRD#: 6207675

Year of Birth: 1990

Formal Education after High School:

- ❖ Virginia Tech, BS Economics, BS Psychology, 2012

Business Background:

- ❖ Burney Partners LLC, Partner, Director of Investment Strategy, 06/2018-present
- ❖ Burney Partners LLC, Associate Portfolio Manager, 06/2012 – 06/2018
- ❖ Burney Company, intern, 06/2008 – 06/2012

Certifications:

- ❖ CFA Charterholder (Chartered Financial Analyst), 2017

This designation is issued by the CFA Institute and is granted to individuals who meet all of the following prerequisites: possess an undergraduate degree and four years of professional experience in investment decision-making. The candidate is required to follow a rigorous self-study and exam program.

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Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision:

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Name: Bijal Patel
CRD#: 2663625
Year of Birth: 1971

Formal Education after High School:

- ❖ Central Connecticut State University, BS Finance, 1995

Business Background:

- ❖ Burney Partners LLC, Partner Director of Relationship Management, Senior Wealth Advisor, 07/2012 - present
- ❖ Capital One, Process Manager, 05/2010 – 06/2012
- ❖ Scottrade, Inc., Branch Manager, 08/2009 – 05/2010
- ❖ Genworth Financial, Manager, 01/2006 – 08/2009

Certifications:

- ❖ Holds the Series 65 Investment Adviser Representative license

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- ❖ CERTIFIED FINANCIAL PLANNER™ certification, 2016
The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).
The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 71,000 individuals have obtained CFP® certification in the United States.

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

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a bachelor’s degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;

- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
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Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
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- 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.

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision:

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Name: Adam Newman

CRD#: 5785551

Year of Birth: 1987

Formal Education after High School:

- ❖ Virginia Tech, BS Applied Economics, 2009

Business Background:

- ❖ Burney Partners LLC, Partner, Senior Wealth Advisor, 04/2017 - present
- ❖ SFG Wealth Planning, Investment Specialist, 08/2012 – 04/2017
- ❖ The Vanguard Group, Inc., Client Relationship Administrator, 04/2011 – 08/2012
- ❖ Cambridge Investment Research, 10/2010 – 04/2011
- ❖ Calle Financial Network, Administrative, 08/2010 – 04/2011
- ❖ Rockwood Wealth Management, Associate Financial Advisor, 05/2009 – 08/2010

Certifications:

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Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision:

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Name: Kyle McFarland

CRD#: 6573077

Year of Birth: 1993

Formal Education after High School:

- ❖ University of Tennessee, Bachelor's Finance and Entrepreneurship, 2016

Business Background:

- ❖ Burney Partners LLC, Associate Wealth Advisor, 11/2016-present
- ❖ Tennessee Valley Asset Management Partners, LLC, Wealth Advisor, 09/2016 – 11/2016
- ❖ LPL Financial LLC, Intern, 10/2015-11/2016
- ❖ Tennessee Valley Asset Management Partners, LLC, Associate, 10/2015-09/2016

Certifications:

- ❖ Holds the Series 7 Investment Adviser Representative license

The Series 7 is a co-requisite exam that needs to be successfully completed in addition to the Series 66 exam before a candidate can register with a state.

- ❖ Holds the Series 66 Investment Adviser Representative License

The Series 66, along with successful completion of the Series 7, is a licensing examination that most states require for anyone who wants to sell securities within the state. It is essentially a combination of the Series 63 and Series 65.

- ❖ CERTIFIED FINANCIAL PLANNER™ certification, 2018
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- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
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Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision:

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Name: Madolynn Stemmer

CRD#: 7064894

Year of Birth: 1990

Formal Education after High School:

- ❖ College of Saint Benedict/Saint John's University, Bachelor of Arts, Political Science, 2012

Business Background:

- ❖ Burney Partners LLC, Wealth Advisor, 12/2018-present
- ❖ Kendall Capital Management Inc., Client Service Associate, 10/2015 - 12/2018
- ❖ David Turch & Associates, Associate, 01/2013 – 10/2015

Certifications:

- ❖ Holds the Series 65 Investment Adviser Representative license

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Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision:

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Name: Ben Scrivener

CRD#: 7011450

Year of Birth: 1991

Formal Education after High School:

- ❖ Christendom College, Bachelor of Arts, Political Science & Economics, 2014

Business Background:

- ❖ Burney Partners LLC, Associate Wealth Advisor, 04/2019-present
- ❖ Strategic Wealth Management Group, Nexit Strategist, 08/2014 - 04/2019
- ❖ PNC Bank, Financial Sales, 05/2014 – 08/2014

Certifications:

- ❖ Holds the Series 65 Investment Adviser Representative license

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Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision:

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Name: Robbie Pratt

CRD#: 7300716

Year of Birth: 1995

Formal Education after High School:

- ❖ University of Mary Washington, Bachelor of Arts History with a Minor in Business Administration, 2017

Business Background:

- ❖ Burney Partners LLC, Client Service Associate, 03/2019 - present
- ❖ Savage Apparel Company, Sales and Event Representative, 08/2017 - 03/2019
- ❖ Burney Partners LLC, Wealth Management Intern, 05/2017 – 08/2017

Certifications:

- ❖ Holds the Series 65 Investment Adviser Representative license

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Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision:

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Name: Bridgett Fountain

CRD#: 2660950

Year of Birth: 1962

Formal Education after High School:

- ❖ Rochester Institute of Technology, Bachelor of Science, Packaging Science, 1994

Business Background:

- ❖ Burney Partners LLC, Client Service Associate, 02/2019 - present
- ❖ Family Firm, LLC, Portfolio Administrator, 01/2013 - 02/2015
- ❖ Burney Company, Associate Portfolio Manager, 07/1997 – 12/2008

Certifications:

- ❖ Holds the Series 65 Investment Adviser Representative license

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Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision:

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Name: Brian Quantrille

CRD#: 7451567

Year of Birth: 1999

Formal Education after High School:

- ❖ Virginia Tech, BS Finance, 2021

Business Background:

- ❖ Burney Partners LLC, Client Service Associate, 06/2021 - present
- ❖ Burney Partners LLC, Wealth Management Intern, 06/2020 – 08/2020
- ❖ Raytheon BBN Technologies, Security Admin Intern, 06/2019 – 08/2019

Certifications:

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Other Business Activities: None

Additional Compensation: None

Supervision:

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Name: Fariba Shahbaz

CRD#: 6879792

Year of Birth: 1961

Formal Education after High School:

- ❖ George Mason and Strayer University, BS Business Administration, 1990

Business Background:

- ❖ Burney Partners LLC, Associate Portfolio Manager, 10/2017 - present
- ❖ Burney Partners LLC, Assistant, 01/1996 – 10/2017

Certifications:

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Other Business Activities: None

Additional Compensation: None

Supervision:

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Name: Joel Sues
CRD#: 7149599
Year of Birth: 1991

Formal Education after High School:

- ❖ Duke University, BS Applied Economics, 2014
- ❖ George Mason University, Master of Arts in Economics, 2017

Business Background:

- ❖ Burney Partners LLC, Portfolio Manager, 02/2019 – present
- ❖ Burney Company, Research Analyst, 08/2016 – 02/2019
- ❖ Branch Banking & Trust Company, Relationship/Branch Banker, 07/2014 – 08/2016

Certifications:

- ❖ CFA Charterholder (Chartered Financial Analyst), 2020

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Other Business Activities: None

Additional Compensation: None

Supervision:

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Name: Brenna Surette

CRD#: 7062916

Year of Birth: 1996

Formal Education after High School:

- ❖ George Mason University, BS in Marketing with a Minor in International Business, 2018

Business Background:

- ❖ Burney Partners LLC, Associate Wealth Advisor, 07/2020 - present
- ❖ Burney Partners LLC, Client Service Associate, 06/2018 – 07/2020
- ❖ ZERO – The End of Prostate Cancer Marketing Intern, Summer 2017

Certifications:

- ❖ Holds the Series 65 Investment Adviser Representative license

The Series 65 is an exam given by FINRA requiring the prospective adviser representative to demonstrate satisfactory knowledge of the securities market, how securities are transacted and proper management of funds. Those candidates who pass the exam are considered to have met the minimum competency level. The exam needs to be retaken if the adviser representative has not been associated with a registered investment adviser for more than two years.

- ❖ CERTIFIED FINANCIAL PLANNER™ certification, 2021
The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 71,000 individuals have obtained CFP® certification in the United States.

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

Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board’s studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a bachelor’s degree from a regionally accredited United States college or university (or its equivalent from a foreign university).

CFP Board’s financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;

- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one’s ability to correctly diagnose financial planning issues and apply one’s knowledge of financial planning to real world circumstances;
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board’s *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

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

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct*. The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.
- CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board’s enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision:

- ❖ All employees of Burney Partners are supervised by Lowell Pratt. For any further questions Lowell Pratt can be reached at 703-391-6020.

Name: Janet Howard

CRD#: 4744817

Year of Birth: 1961

Formal Education after High School:

- ❖ NA

Business Background:

- ❖ Burney Partners LLC, Client Service Associate, 10/2020 – present
- ❖ Edelman Financial Engines, Client Service Associate, 09/2017 – 09/2020
- ❖ Blisk Financial Group, Executive Admin, 11/2015 – 09/2017
- ❖ Family First Dental, Clinic Administrator, 06/2014 – 11/2015

Certifications:

- ❖ Holds the Series 65 Investment Adviser Representative license

The Series 65 is an exam given by FINRA requiring the prospective adviser representative to demonstrate satisfactory knowledge of the securities market, how securities are transacted and proper management of funds. Those candidates who pass the exam are considered to have met the minimum competency level. The exam needs to be retaken if the adviser representative has not been associated with a registered investment adviser for more than two years.

Disciplinary Information: None

Other Business Activities: None

Additional Compensation: None

Supervision:

- ❖ All employees of Burney Partners are supervised by Lowell Pratt. For any further questions Lowell Pratt can be reached at 703-391-6020.