

Part 2B: Brochure Supplement

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This brochure supplement provides information about the individuals named above and supplements Roof, Eidam & Maycock, LLC's brochure. You should have received a copy of that brochure. Please contact us at 415-788-4600, or by email at jperalta@remadvisors.com if you did not receive our brochure or if you have any questions about the contents of this supplement.

Additional information about Gary, Don, Randall, John and Justin is available on the SEC's website at www.adviserinfo.sec.gov.

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Partners of REM have obtained their CFP® and AIF® and are therefore required to provide additional information on the education and experience requirements to obtain the CFP® and AIF®.

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

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

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

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

Accredited Investment Fiduciary® (AIF®)

The AIF designation certifies that the recipient has specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF designation, individuals must complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the AIF Code of Ethics. In order to maintain the AIF designation, the individual must annually renew their affirmation of the AIF Code of Ethics and complete six hours of continuing education credits. The certification is administered by the Center for Fiduciary Studies, LLC (a Fiduciary360 (fi360) company).

Gary E. Roof, CFP®

Education Background and Business Experience

Born in 1952, Mr. Roof obtained his B.S. in pre-law at Wright State University in Ohio. Gary is a partner and founder of REM in 1982.

Disciplinary Information

Mr. Roof has not been subject to any disciplinary or legal events.

Other Business Activities

Mr. Roof is a registered representative of LPL Financial, a FINRA registered broker dealer.

Additional Compensation

Mr. Roof may receive commissions pursuant to the purchase of financial products through LPL Financial in addition to his regular share of profits.

Supervision

Mr. Roof is a partner of REM and therefore not under the direct supervision of any one individual. Mr. Roof works closely with the other three partners of REM to monitor the advice provided to clients.

Don H. Eidam, CFP®

Education Background and Business Experience

Born in 1966, Mr. Eidam received his B.A. in Economics and International Relations at the University of Wisconsin. He joined REM in 1988 and became a partner in 1993.

Disciplinary Information

Mr. Eidam has not been subject to any disciplinary or legal events.

Other Business Activities

Mr. Eidam is a registered representative of LPL Financial, a FINRA registered broker dealer.

Additional Compensation

Mr. Eidam may receive commissions pursuant to the purchase of financial products through LPL Financial in addition to his regular share of profits.

Supervision

Mr. Eidam is a partner of REM and therefore not under the direct supervision of any one individual. Mr. Eidam works closely with the other three partners of REM to monitor the advice provided to clients.

Randall R. Maycock, CFP[®]

Education Background and Business Experience

Born in 1963, Mr. Maycock earned a BSE in entrepreneurial management from the Wharton School at the University of Pennsylvania. He joined REM in 1990 and became a partner in 1997.

Disciplinary Information

Mr. Maycock has not been subject to any disciplinary or legal events.

Other Business Activities

Mr. Maycock is a registered representative of LPL Financial, a FINRA registered broker dealer.

Additional Compensation

Mr. Maycock may receive commissions pursuant to the purchase of financial products through LPL Financial in addition to his regular share of profits.

Supervision

Mr. Maycock is a partner of REM and therefore not under the direct supervision of any one individual. Mr. Maycock works closely with the other three partners of REM to monitor the advice provided to clients.

John Peralta, AIF[®], CFP[®]

Education Background and Business Experience

Born in 1970, Mr. Peralta earned a BS in finance, banking and real estate from San Francisco State University. He joined the firm in 1995 and became a partner in 2001.

Disciplinary Information

Mr. Peralta has not been subject to any disciplinary or legal events.

Other Business Activities

Mr. Peralta is a registered representative of LPL Financial, a FINRA registered broker dealer.

Additional Compensation

Mr. Peralta may receive commissions pursuant to the purchase of financial products through LPL Financial in addition to his regular share of profits.

Supervision

Mr. Peralta is a partner of REM and therefore not under the direct supervision of any one individual. Mr. Peralta works closely with the other three partners of REM to monitor the advice provided to clients.

Justin Dyer, AIF[®], CFP[®]

Education Background and Business Experience

Born in 1983, Mr. Dyer graduated from UC Santa Cruz in 2006 with a BA in economics and a minor in mathematics. He joined our firm in 2007; as a financial advisor, his primary responsibilities include financial planning and investment research.

Disciplinary Information

Mr. Dyer has not been subject to any disciplinary or legal events.

Other Business Activities

Mr. Dyer is a registered representative of LPL Financial, a FINRA registered broker dealer.

Additional Compensation

Mr. Dyer does not receive commissions pursuant to the purchase of financial products through LPL Financial in addition to his regular salary.

Supervision

Mr. Dyer works under the direct supervision of the partners of REM, which include Mr. Roof, Mr. Eidam, Mr. Maycock, and Mr. Peralta. Anyone of the partners may be contacted by phone at 1-415-788-4600.