

**FORM ADV, PART 2B  
BROCHURE SUPPLEMENT**

**for**

**Mark Edward McMeans**

**Brasada Capital Management, LP**

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**This brochure supplement provides information about Mark Edward McMeans that supplements the Brasada Capital Management, LP brochure. You should have received a copy of that brochure. Please contact us at (713) 630-8390 if you did not receive Brasada Capital Management's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Mark Edward McMeans is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

**Item 1 Cover Page**

## **Item 2 Educational Background and Business Experience**

*Mark Edward McMeans, born 1964*

### **Education:**

- University of Texas at Austin, BBA degree in accounting, 1986
- Rice University, MBA degree with a concentration in finance, 1992
- CFA charter holder, 1995, CPA, 1989 (see information on CFA designation after management experience).

### **Experience:**

- Invesco (fka AIM Investments)  
2005-2007 - Director of Equity Investments, Managing Director of AIM Capital Management, Inc.  
2000-2005 - AIM Private Asset Management, Inc. President & Chief Operating Officer  
1997-2000 - Senior Equity Officer  
1996-1997 - Director of Electronic Commerce  
1992-1996 - Institutional Marketing Project Manager
- JPMorgan Chase - Trust Officer, 1989-1991
- KPMG Peat Marwick, LLP - Senior Accountant, 1987-1989

### **A Note Regarding the Chartered Financial Analyst (CFA) Designation:**

The Chartered Financial Analyst (CFA) charter which several Brasada members hold 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 90,000 CFA charterholders working in 134 countries. 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 22 countries and territories recognize the CFA charter as a proxy for meeting certain licensing requirements, and more than 125 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.

To learn more about the CFA charter, visit [www.cfainstitute.org](http://www.cfainstitute.org).

## **Item 3 Disciplinary Information**

Brasada Capital Management, LP (Brasada) is required to disclose all material facts relating to any legal or disciplinary events of its supervised persons which may be material to an investor or prospective investor in their evaluation of Brasada.

Mark Edward McMeans has not been involved in any legal or disciplinary events material to an evaluation of Brasada or its officers.

## **Item 4 Other Business Activities**

- A. Mark E. McMeans serves as an Advisory Board Member on two student run investment funds (Rice University, MBA Student Managed Fund and UT Austin, MBA Investment Fund, LLC) and is an Advisory Committee Member of the MBR Financial Investment Committee.

Currently there is no business relationship between Brasada and any of these groups.

- B. Mr. McMeans receives compensation for his quarterly meeting participation on the MBR Financial Investment Committee.

#### **Item 5 Additional Compensation**

Mark Edward McMeans does not receive any economic benefits from any non-client for providing advisory services.

#### **Item 6 Supervision**

Brasada's three principals share responsibility for management of the firm. Mr. McMeans' investment activities on behalf of the separately managed accounts are reviewed by the other two principals on a monthly basis:

Ronald Philip Stein, Principal/Director of Trading, (713) 630-8392  
James Gabriel Birdsall, Principal/Portfolio Manager (713) 630-8393

Topics discussed include: net exposure, portfolio holdings, cash position, technical and fundamental analysis of specific holdings, recent trading activity, number of holdings, position sizes as well as market outlook and portfolio strategy for the near term.