

**Item 1: Cover Page**  
**Part 2B of Form ADV: Brochure Supplement**  
**August 2014**

**Scott Matthew Freund**

**Family Office Research, LLC**  
**5821 Plainview Road**  
**Bethesda, MD 20817**  
**[www.FamilyOfficeResearch.com](http://www.FamilyOfficeResearch.com)**

**Firm Contact:**  
**Scott Matthew Freund**  
**Chief Compliance Officer**

**This brochure supplement provides information about Mr. Freund that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Freund if you did not receive Family Office Research, LLC's brochure or if you have any questions about the contents of this supplement. Additional information about Mr. Freund is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## Item 2: Educational Background & Business Experience

**Scott M. Freund**

**Year of Birth:** 1969

### **Education Background:**

- 1991: Virginia Tech; Bachelor of Science in Mechanical Engineering & Minor in Engineering Science & Mechanics

### **Business Background:**

- 04/2012 – Present Global Arena Investment Management; Investment Advisor
- 05/2007 – Present Family Office Research, LLC; Managing Member & CCO
- 02/2008 – 07/2010 GCC Family Wealth Management, Inc; President
- 07/2005 – 07/2007 H Beck/Piedmont Investment Advisors, LLC
- 03/2003 – 07/2005 Private Bank at Bank of America; Senior VP & Client Advisor
- 1999 – 03/2003 Morgan Stanley; Senior Consultant & ICS

## Item 3: Disciplinary Information<sup>1</sup>

There are no legal or disciplinary events material to the evaluation of Mr. Freund.

## Item 4: Other Business Activities

Mr. Freund is a licensed insurance agent through numerous insurance companies. In such a capacity, he may offer insurance products and receive normal and customary commissions as a result of such a purchase. This presents a conflict of interest to the extent that he recommends the purchase of an insurance product which results in a commission being paid to him as an insurance agent. He spends 5% of his time on these activities. Mr. Freund shall not offer insurance products to clients residing in Pennsylvania.

Mr. Freund offers business consulting services to various companies. In his role as a business consultant he may offer consulting related products and services to Advisor's clients for which he may receive compensation. He spends 10% of his time on these activities.

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<sup>1</sup> Note: Our firm may, under certain circumstances, rebut the presumption that a disciplinary event is material. If an event is immaterial, we are not required to disclose it. When we review a legal or disciplinary event involving Mr. Freund to determine whether it is appropriate to rebut the presumption of materiality, we consider all of the following factors: (1) the proximity of Mr. Freund to the advisory function; (2) the nature of the infraction that led to the disciplinary event; (3) the severity of the disciplinary sanction; and (4) the time elapsed since the date of the disciplinary event. If we conclude that the materiality presumption has been overcome, we prepare and maintain a file memorandum of our determination in our records. We follow SEC rule 204-2(a)(14)(iii) and similar state rules.

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

Mr. Freund does not receive any other economic benefit for providing advisory services in addition to advisory fees.

#### **Item 6: Supervision**

Mr. Freund is the principal and Chief Compliance Officer and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics.